

# The Scaling Of Playworks: A Case Study



A Report for the Robert Wood Johnson Foundation

By Mary B. Geisz, PhD, MBA

*September 2017*

# The Scaling Of Playworks: A Case Study

## Contents

<b>Executive Summary</b>	<b>3</b>
<b>Introduction</b>	<b>9</b>
<b>Fixing Recess: The Spark of an Idea</b>	<b>10</b>
<b>RWJF as the “Quintessential Catalyst”</b>	<b>13</b>
<b>A Scalable Idea Meets a Framework for Scaling</b>	<b>16</b>
<b>1. Leading and Managing</b>	<b>18</b>
<b>2. Developing a Strategy for Growth—With an Eye to Scale</b>	<b>21</b>
<b>3. Ensuring Financial Viability</b>	<b>24</b>
<b>4. Evaluating the Practice of Playworks</b>	<b>33</b>
<b>5. Communicating the Idea</b>	<b>38</b>
<b>6. Fortifying Organizational Infrastructure and Governance</b>	<b>46</b>
<b>7. Cultivating Relationships</b>	<b>51</b>
<b>Top Takeaways</b>	<b>53</b>
<b>Playworks into the Future</b>	<b>55</b>
<b>Connecting Playworks to a Culture of Health</b>	<b>57</b>
<b>Conclusion</b>	<b>58</b>
<b>Appendix</b>	<b>59</b>
<b>A - Playworks Timeline</b>	<b>59</b>
<b>B - Playworks’ Revenue History: FY 2007 through FY 2016</b>	<b>64</b>
<b>C - Grants from RWJF</b>	<b>65</b>
<b>D - Selected Playworks Reports</b>	<b>68</b>
<b>E - List of People Interviewed</b>	<b>69</b>

## Executive Summary

*“Play brings out the best in every kid.”*

*—Jill VIALET, Playworks Founder and CEO*

Founded in 1996 by Jill VIALET as Sports4Kids<sup>1</sup>, Playworks provides supervised, inclusive recess programs at schools across the United States. As of September 2017 Playworks serves over 1,300 schools in 23 communities, reaching more than 700,000 students directly and through training services.

Since 2005 the Robert Wood Johnson Foundation (RWJF) has provided \$43.6 million<sup>2</sup> in funding and a critical scaffold of supports for the scaling of Playworks, including financial management consulting, evaluation, and extensive communications assistance.

At RWJF in 2005, its then Vulnerable Populations Team was beginning to frame a strategy to address the social determinants of health. “The compass of this portfolio,” said former Team Director Jane Isaacs Lowe, PhD, MSW, “was to identify new pathways for improving health that recognized the deep connections between health and where and how we live. ‘Health happens where you live, work, learn, and play’ became the mantra for the Vulnerable Populations portfolio and the ‘play’ came from and was embodied by Playworks. Vulnerable Populations’ work was a precursor to the Culture of Health.”

The overarching construct was to use strategic philanthropy to identify practical community-based solutions to broad social challenges that had the potential to scale and be sustainable. Playworks became one of the first and leading programs to take that strategy forward.

### A CASE STUDY OF SCALING

This case study describes Playworks’ experience and RWJF’s role as Playworks grew from a small nonprofit to a national organization spreading the message of the importance of play in schools and school districts throughout the United States. It is a story that is rich with lessons valuable to RWJF’s work as it helps to build a Culture of Health and also to other organizations seeking to scale an idea.

The factors that enabled the growth of Playworks and set the stage for scaling are many and varied. A framework emerged from the case study that organizes and describes the key elements that have made Playworks successful.

---

<sup>1</sup> Sports4Kids became Playworks in 2009, a process described in this report. While the organization name was Sports4Kids from 1996 to 2009, for simplicity this report refers to it as Playworks throughout.

<sup>2</sup> RWJF has awarded Playworks a one-time grant, not included in this total, to provide additional operating support. This is [grant ID 74582](#) for \$1 million, from July 1, 2017 through December 31, 2018.

## It Starts with a Scalable Idea

Playworks began with a simple idea: provide structured play during school recess periods that engages all children and gives kids the tools to resolve conflicts and keep playing.

But the simplicity of this idea belied its bold objective: to use the power of play to contribute to children's social and emotional development. As a result, the true beauty of this simple idea is that it teaches children how to self-regulate, how to organize, how to collaborate, how to work in teams—those executive function skills that have been shown to be critical to one's success as an adult.

In describing RWJF's connection with Playworks, Executive Vice President James Marks, MD, MPH, emphasized “the notion of play as a central way that kids develop socially—that it isn't frivolous, it is a central part of good development. And so for us, this intervention, this approach, mixed health and learning and social maturity.”

There was also a value proposition. Principals were willing to spend scarce funds to have it in their school because Playworks helped to solve one of their biggest headaches—the recess problem. Recess generates many of a school's discipline referrals, staffing recess is problematic for many schools, and playground aggression often spills over into the classroom costing lost teaching time. With Playworks, recess instead becomes a key contributor to a healthier, happier, safer school environment.

Principals love it and pay for it. Teachers love it and want it in the school. Parents love it and support it. And best of all, kids love it and learn from it.

## The Framework for Scaling

The framework organizes the Playworks experience into seven elements necessary to Playworks' scaling success and with broad applicability for others scaling an idea:

1. Dynamic **leadership** to inspire the effort and highly capable **management** to guide it.
2. A **strategy for growing and scaling**.
3. Expert, ongoing **financial analysis and oversight** to ensure viability over the long-term.
4. Well-constructed **evaluation** to provide evidence that the idea works in practice.
5. A **strategy for effectively communicating** the idea to the right audiences.
6. A solid, comprehensive **organizational infrastructure** to support the effort.
7. A network of stable, dependable, and trusting **relationships** to undergird the effort and provide a safety net in difficult times, a cheerleading squad in unsettled times, and a celebratory troop when it's time to applaud.



## A SUMMARY OF KEY LESSONS AND INSIGHTS

### Leading and Managing

**Leadership is essential to organizational success.** Playworks founder Jill Violet is considered a true visionary, with a bold idea and the ability to inspire others. Her leadership has been critical to the growth and success of Playworks. At the same time, she is aware of her own strengths and weaknesses and welcoming of those who are expert where she is not.

Violet has not succumbed to “founder’s syndrome” but has brought in strong management, particularly President/COO Elizabeth Cushing, who is widely viewed as an exceptionally talented leader and manager.

This strong leadership at the helm of Playworks has been pivotal, and more important than any other factor, to its success.

### Strategy Development

**Successful growth and scaling require careful and deliberate strategic thinking.** Many organizations fail because they try to scale before they are ready. Thoughtful development of a strategy for Playworks’ expansion on the part of Playworks leadership and RWJF laid a solid foundation for its success.

Nonprofits and their funders must work together to plan for the long-term. Yet, many funders are focused on “results” and not on a true partnership with the funded organization. With expert strategic assistance Playworks paid attention to the growth that is needed before scaling, that makes the difference between success and failure.

Playworks and RWJF came to understand that growing an organization to the point where it can credibly consider scaling takes a great deal of time. Learning early whether the model works is essential. Building the service base can take five to 10 years, and broad adoption another five to 10 years, before movement building can start. This timetable, laid out in the early years of the RWJF/Playworks relationship, has borne out.

### Financial Management

**Lack of financial acumen has been the demise of many nonprofit organizations.** A strong financial management infrastructure, led by an astute and experienced CFO supported by professional financial managers and analysts, is critical, as is a board that is closely engaged in the financial performance of the organization.

In the early years at Playworks financial management was that of a fledgling organization more focused on developing its programming and drawing in new sites than in paying attention to its fiscal undergirding. As Playworks grew and expanded geographically well beyond its California base, the critical need for strong financial leadership and infrastructure became starkly apparent.

The financial challenges at Playworks were harrowing at times and the role of RWJF financial staff and resources in stabilizing, building, and ensuring Playworks' financial security was crucial. Without the technical assistance of RWJF's top financial officers and the Foundation's funding (including, in particular, program-related investments through bank loan guarantees), Playworks likely would not have survived. At best it would have remained a local organization serving a small number of schools. It would not have achieved the growth and spread it has today.

This effort was successful because RWJF operated in a different way relative to Playworks from its typical financial relationship with a grantee. Here the relationship was more like that of a venture capitalist or bank—providing funding but requiring Playworks to establish the professional financial structure commensurate with the business that it is.

This relationship imposed a strict discipline on the leadership of Playworks in its handling of the organization's finances. A strong, experienced CFO was hired along with skilled support staff; a CEO from industry became board chair; a contingency plan was created; and Playworks leaders developed their own financial skills. The financial capability of the organization grew exponentially.

Playworks is now on stable financial footing. The fiscal 2016 audit showed Playworks to be in a solid financial position, with no outstanding debt. It has not been a smooth path to this point, but RWJF's commitment and expertise and the willingness of both parties to operate and relate in new ways have set the organization on a clearer path for the future.

## Evaluation

**Clear evidence that a program works is necessary for successful replication and growth.** A program cannot be taken to scale or draw the interest of funders and other supporters without a strong evidence base. And ultimately a movement will best be built upon a solid scaffold of evidence.

Thus, the evaluation assistance provided by RWJF was integral to establishing Playworks' credibility, expanding its visibility, and developing its team of funders. Evaluation findings offered solid support for the program's benefits and were invaluable to effective communication about its impact and worth. While internal evaluation capability is important (and Playworks has developed this over time), the value of independent evaluation by highly respected external evaluators cannot be overstated.

Evaluation was a key component of RWJF's support framework for Playworks—one that ensured that the Foundation's funding and other technical assistance were in the service of a substantive idea of evidence-backed merit.

## Communications

**Communications is not just publicity—it is a strategic tool.** And the communications work around Playworks was truly strategic.

Playworks was one of the first programs handled through RWJF's new communications structure under which the focus was strategic communications managed by RWJF communications staff through contracts with leading communications firms. The communications support provided to Playworks by RWJF communications officers and the contracted firms was invaluable. These experts helped Playworks think through the program's value proposition and message—and define what Playworks was all about.

It became clear to both Playworks and RWJF staff that a comprehensive communications campaign was as important to Playworks' long term success as was strong financial management. And Playworks was/is an attractive product to market—"like gold" to communications people.

Combined with the evidence afforded by professional external evaluation the communications work around Playworks was a significant factor in its success. At the same time, this experience offered its own evidence for the value of communications in furthering the uptake of worthwhile programs, evidence that paved the way for the use of strategic communications by other major RWJF programs. It showed that providing substantive communications support to grantees will return value to a funder by helping to ensure grantee success and the sustainability of the funder's investments.

## Organizational Infrastructure and Governance

**An organization's board and infrastructure form the framework supporting the organizational vision.** Many nonprofits that attempt to scale make a key mistake in relying on a board comprised of friends of the founder who lack the objectivity and the expertise needed to provide real guidance to organization leadership. The board may take too advisory of a role and not understand its substantive responsibility for the health of the organization.

Playworks began with a typical initial board but over time the board has evolved into a professional body of individuals offering a range of knowledge, experiences, and community connections, working together in a structure that allows reasoned and timely decision making. The board recognizes that it must be attentive to the financial health of the organization in concert with its program and strategy and that its plan for itself must match future plans for the organization.

As with many young nonprofits, Playworks began with a small staff that, over time, lacked the range of skills and experience needed for an ever-expanding national organization. However, Playworks leadership came to understand the need for investing in its workforce and recruiting for operational excellence. A strong executive team is now in place with the support of capable staff. Internal systems have been developed that allow for quick response to changing environments.

## Cultivating Relationships

**If people hadn't behaved like they did, it wouldn't have worked.** A sense of true partnership between RWJF and Playworks prevailed. Practicality, realism, and patience

were evident among all parties involved and allowed for the free flow of information and the meeting of big and small challenges. Strong working relationships among RWJF staff from different departments resulted in a positive team spirit essential to forward movement over a decade of effort.

RWJF's commitment to Playworks enabled other key funders to make significant investments and led to important relationships among RWJF and other funders. These funders now have valuable roles in Playworks' future.

The strong and deep relationship between RWJF and Playworks can continue to provide rich benefits to each organization. Maintaining a connection is in the interest of both.

## **PLAYWORKS INTO THE FUTURE**

The scaling of Playworks is well on its way. RWJF's investment was leveraged many-fold over the course of 12 years as new revenue came with growth and a cadre of both national and local funders came on board. The organization is financially stable and has a strong infrastructure of experienced and knowledgeable professionals in the national office and at the regional level. It has a strong and engaged board and many funding partners and continues to gain national attention.

Key undertakings as of September 2017 include:

- A goal of reaching 3.5 million kids, in 7,000 schools by December 2020, with a new \$30 million growth capital campaign.
- New approaches and collaborations such as expanding TeamUp (which trains school personnel to handle recess) and partnerships with Boys and Girls Clubs of America, City Year, and schools of education.
- Recognition from the 100&Change competition<sup>3</sup> offered by the MacArthur Foundation. Playworks' application proposed a plan—for 20 million students in 40,000 schools by December 2022—to use play to build the necessary social and emotional skills (such as cooperation, empathy, listening) for children to become thoughtful leaders and effective citizens. Its proposal was selected as one of the top 10 educational submissions out of more than 1,900 total applicants.

---

<sup>3</sup> See [information](#) about Playworks' application and recognition on the Playworks website.



# The Scaling Of Playworks: A Case Study

*“Looking back on a year, I feel I have made a difference in a lot of kids’ lives and that they feel empowered to play and to continue healthy play throughout their lives.”*

*— Danielle Pifer, Playworks Site Coordinator*

## INTRODUCTION

Founded in 1996 as Sports4Kids<sup>4</sup>, Playworks provides supervised, inclusive recess programs at schools across the United States. It has been supported by the Robert Wood Johnson Foundation (RWJF) since 2005 and has scaled up considerably in the last several years. As of September 2017 Playworks is serving over 1,300 schools in 23 communities, reaching more than 700,000 students directly and through training services.

RWJF has provided \$43.6 million<sup>5</sup> in funding and a scaffold of supports for the scaling of Playworks, including financial management consulting, evaluation, and extensive communications assistance. This support has been the major contributor to Playworks’ expansion to a national organization that continues to grow, furthering founder Jill VIALET’s vision that “one day every kid in America gets to play every day.”

The story of the scaling of Playworks is complex and dramatic. At many points the undertaking could have failed, and it took dedicated time and effort by many talented players, along with significant financial and intellectual resources, to nurture Playworks to the stability it enjoys today. Yet throughout uncertainty and upheaval, the value and attraction of its service model remained constant.

Playworks offers a special opportunity for learning not only about bringing a small nonprofit entity to national scale but, as well, about nurturing a novel idea into the solid foundation of a national movement.

This case study describes the experience of Playworks as it grew from a small nonprofit in the San Francisco Bay Area to an organization of national scope that is spreading the message of the importance of play in schools and school districts throughout the United States. It introduces a framework that addresses the key elements in the scaling of Playworks—elements that likely have relevance for other scaling efforts. And it presents sets of lessons gleaned from Playworks’ experience that can be valuable contributors to

---

<sup>4</sup> Sports4Kids became Playworks in 2009, a process described in this report. While the organization name was Sports4Kids from 1996 to 2009, for simplicity this report refers to it as Playworks throughout.

<sup>5</sup> RWJF has awarded Playworks a one-time grant, not included in this total, to provide additional operating support. This is [grant ID 74582](#) for \$1 million, from July 1, 2017 through December 31, 2018.

RWJF’s work as it helps to build a Culture of Health and also to other organizations that seek to scale an idea.

### A Word about the Case Study

To gather information for the case study, the author, Mary B. Geisz, PhD, MBA, reviewed relevant documents from Playworks and RWJF and conducted in-depth telephone interviews between August and December 2016 with 23 individuals. These included Playworks leaders and field staff, RWJF leaders and officers, former RWJF communications officers, external strategy and communications professionals, and leaders from other major funders of Playworks. See [Appendix E](#) for a list of those interviewed.

### Acknowledgements

The author thanks the Playworks and RWJF leaders and staff (current and former), consultants, and other funders who contributed their time, insights, and reflections, and, most especially, RWJF Senior Adviser for Program Development Nancy Barrand, MPA, who provided guidance and support. Mary Nakashian, MA, supplied excellent editorial assistance.

## FIXING RECESS: THE SPARK OF AN IDEA

*“What I really need help with is recess.  
Can you do anything about that instead?”  
—Elementary School Principal, Oakland, Calif.*

It was 1995 and Jill Vialet, founder and executive director of the Museum of Children’s Arts (MOCHA) in Oakland, Calif., was about to pitch her program to send artists into schools, when the elementary school principal’s plea sent her in another direction.

That principal’s frustration with yet another school yard squabble making it to the office was emblematic of a problem familiar to principals, teachers, and staff at many schools nationwide: the recess problem. According to data from the School-Wide Information System (SWIS), the playground is the second most common location (after the classroom) for both minor and major office discipline referrals, such as defiance/disrespect, disruption, and physical aggression.<sup>6</sup> Staffing recess is also problematic for many schools, which often resort to part-time, untrained “yard monitors,”

---

<sup>6</sup>Gion CM, McIntosh K, and Horner R. *Patterns of Minor Office Discipline Referrals in Schools Using SWIS*. PBIS: Positive Behavioral Interventions & Supports, U.S. Office of Special Education Programs Technical Assistance Center, 2017.

ill-equipped and too short-staffed to handle the inevitable conflicts, let alone create a positive, inclusive play experience for all students.

Despite research supporting recess as important to children's cognitive, social-emotional, and physical development, recess began to be viewed as a use of potential academic time that resulted in fights, bullying, and kids too wound up from recess altercations to settle down for classroom learning, thereby losing valuable teaching time. According to the National Association for the Education of Young Children (NAEYC), a reduction in recess time in favor of instructional time began in some schools in the late 1980s.<sup>7</sup> This trend continued and especially took hold with the passage of No Child Left Behind in 2001.

In particular, urban schools with high percentages of minority children and children from families living below the poverty line were most likely to reduce or eliminate recess, with 39 percent of African American students and 44 percent of poor children not having recess versus 15 percent of white students and 17 percent of those above the poverty line, according a 2003 study noted by NAEYC.<sup>8</sup>

What Violet encountered at the school in Oakland was very different from her own playground memories. She fondly recalled “Coach Clarence” at her local playground who encouraged her involvement in a range of games and sports. The interests that grew out of her early playground experience led to high school and college sports, camp counseling, soccer coaching, and a life-long attachment to all sorts of physical activity.

As Violet pondered the principal's dilemma she reflected on her own experiences working with school children and the importance of “leading with an awareness about context and social and emotional learning” and establishing a learning environment where the goals and responsibilities of the grown-ups are “to make sure that kids feel safe and seen and welcome—and that they're having fun.” This thinking propelled Violet to envision a new kind of recess, one that includes everyone, offers lots of options for play, and teaches not only all kinds of games but life skills like conflict resolution, fair play, taking turns, and compassion.

To get started Violet hired Andrea, a college basketball buddy, paying her with support from the Berkeley Education Fund. Violet had a plan to structure a recess program based in large part on her experiences as a summer camp counselor: teaching the game rules, making kids responsible for taking care of each other and keeping the games going, and giving the kids tools for resolving conflicts and evening out uneven teams. “It was both

---

<sup>7</sup> Jarrett O and Waite-Stupiansky S. “[Recess—It's Indispensable!](#)” *Play, Policy, and Practice Interest Forum*. National Association for the Education of Young Children, 2009.

<sup>8</sup> Roth J, Brooks-Gunn J, Linve M, and Hofferth S. “[What Happens During the School Day? Time Diaries from a National Sample of Elementary School Teachers](#).” *Teachers College Record* 105(3): 317–43, 2003.

completely seat of the pants,” she said, “but also grounded in a lot of experience working with kids and teaching them how to get along.”

### ***The Recess Fix Looked Like This:***

An energetic, twenty-something coach with an enthusiasm for kids is working full-time in one elementary school, supervising recess for all grades—but not the same old recess. During this recess, children learn and play a vast array of games, with something to suit everyone and several games going on at once. Kids work out conflicts and disagreements among each other through use of Rock Paper Scissors<sup>9</sup>. Some older students are selected and trained as junior coaches, with the responsibility of including everyone, helping deal with issues that arise, and teaching game skills.

In addition to their recess work, the coaches conduct games during class time and run afterschool programs. They become integral members of the school family, known and loved by students, teachers, staff, and administrators alike.

Schools pay a portion of the cost of providing the Playworks coach, who is an AmeriCorps volunteer. Playworks staff trains the coaches and provides oversight and management of the program at the local level.

Two schools in Berkeley were willing to try it out—and Playworks was born and incorporated in 1996. A seven-member board of directors was put together from people Viallet knew from her work at MOCHA (which she left in August 1996 to focus full-time on Playworks) and were excited to help support play in schools.

“What was wild about it,” Viallet said, “was that it worked so well!” Principals began telling other principals that “they’re fixing recess!” Two schools the first year became seven schools the next. In the third year the number of schools doubled to 14. A few years later there were 28. This exponential growth is illustrative of Playworks being in the right place at the right time—and being nimble enough to seize the moment. “The schools were calling me,” Viallet said. “What became clear was that I was solving a problem that people were aware of and felt the pain point directly about.”

The staff kept increasing to keep pace with the schools. In the first year there was Viallet and Andrea, who left after that year to become a firefighter. In the second year there were seven coaches in the seven schools and Sarah, from the Jesuit Volunteer Corps, in the office. In the third year Kate came on board as program director, and Molly and Jonas were in the office. At that point (1999) Viallet was on maternity leave with her second child, a circumstance that turned out to be, she said, “incredibly valuable, because it built

---

<sup>9</sup> Rock Paper Scissors, also called RoShamBo, is a game in which two people simultaneously make one of three shapes with one hand. The winner is decided through a circular hierarchy of: rock crushes scissors, scissors cuts paper, paper covers rock.

a sort of internal self-management capacity. A lot of people owned the organization. I was not at the center of every decision.”

About five years in Playworks began to get requests for training and to open sites in other regions. Violet felt the new organization couldn’t handle expanding to other regions at that point, but it kept growing locally.

## Pivotal Events

Then Violet was nominated for and, in 2004, named an Ashoka Fellow.<sup>10</sup> The Ashoka fellowship was transformative. It helped Violet “to look more closely at what scale really means,” she said. The “extraordinary” Ashoka network has provided helpful contacts among other fellows when Playworks has opened in new cities and Ashoka Founder and CEO Bill Drayton and others at Ashoka have introduced Violet to people who became funders and supporters. At the same time the fellows are a sounding board of experienced advice that has come at just the right moments.

Playworks appeared poised to take off. Violet and Playworks were getting some national attention as a result of the Ashoka exposure and through word-of-mouth among school principals. The urge to expand beyond the Bay Area was becoming harder to ignore. Two key connections occurred at this time that would become critical to Playworks’ future growth.

In 2004 Elizabeth Cushing was hired as director of evaluation. Cushing’s career had focused on nonprofits and, she said, she was then looking for “a new role where I could work with really smart people doing interesting work.” This would turn out to be a pivotal hire, as Cushing would eventually become president and chief operating officer, and absolutely essential to Playworks’ future.

And in early 2005 RWJF came on the scene.

## RWJF AS THE “QUINTESSENTIAL CATALYST”

*“RWJF was the quintessential catalyst—challenging our thinking and then really inspiring us to action.”*

*—Jill Violet, Playworks Founder and CEO*

---

<sup>10</sup> Ashoka Fellowships recognize the world’s leading social entrepreneurs and provide lifetime support that includes an up-to-three-year stipend, customized engagement opportunities to accelerate the impact of fellows’ ideas, increased visibility, and a global community of peers. Learn more at Ashoka’s [website](#).



## A Match with the Vulnerable Populations Portfolio

At RWJF in 2005 the Vulnerable Populations Team was beginning to frame a strategy that “would broaden the definition of health to address social determinants of health and would scale high-impact community-based interventions,” said then Senior Program Officer Nancy Barrand. “We were reaching out to lots of different people to find practical community-based solutions to broad social challenges that had the potential to scale.”

“The compass of this portfolio,” said former Team Director Jane Isaacs Lowe, “was to identify new pathways for improving health that recognized the deep connections between health and where and how we live. ‘Health happens where you live, work, learn, and play’ became the mantra for the Vulnerable Populations portfolio and the ‘play’ came from and was embodied by Playworks. The work of Vulnerable Populations really was a precursor to the Culture of Health.”

Thus, the overarching construct was using strategic philanthropy to “address health where it happens,” said Barrand, and to scale programs that could have real and broad impact. Playworks became one of the first and leading programs to take that strategy forward.<sup>11</sup>

## Connecting RWJF with Playworks

RWJF’s initial contact with Playworks came in 2004 through Ashoka’s founder and then CEO, Bill Drayton. At the time the Foundation was gearing up its multi-year commitment to reduce childhood obesity. Drayton recommended to Barrand that, if RWJF was interested in reducing childhood obesity, she should get in touch with Jill Violet at Sports4Kids.

“I have tremendous respect for Ashoka,” Barrand said. So Barrand phoned Violet “completely out of the blue, only to find out that Sports4Kids wasn’t really about childhood obesity and, despite the name, wasn’t really about sports either. It was about play and the importance of play for young children’s social and emotional development, with the added benefit of promoting physical activity in kids. It was intriguingly innovative.”

Since Playworks did not fit with the Childhood Obesity Team’s strategy at the time, and because it targeted schools in low-income communities, Barrand and Lowe brought it into the Vulnerable Populations Portfolio. They asked Violet to describe her vision and she portrayed a future where every child would have the opportunity to play every day and explained how she wanted to build a platform that could catalyze a movement to

---

<sup>11</sup> Other RWJF programs that also employed this strategy included: CeaseFire (now Cure Violence), EDIPP (Early Detection, Intervention and Prevention of Psychosis), Green House Project, Health Leads, Keeping Families Together, and Supportive Housing.

make play an essential part of elementary school education. “And that is the vision we set out to fund in 2005,” said Barrand.

### **An Extremely Brief Summary of a Long and Complex Relationship**

Thus began a decade-long relationship between Playworks and the Robert Wood Johnson Foundation—a multi-layered, complicated partnership that drew in RWJF program, finance, legal, evaluation, and communications staff, along with external evaluators, business and communications strategists, and other funders. Over 10 years, RWJF provided:

- Funding totaling \$43,592,665, which included:
  - Grants and program-related investments of \$36,697,424
  - Funding for external evaluation activities of \$4,046,399
  - Funding for external communications activities of \$2,848,842.
- Strong, committed organizational backing by key RWJF program staff
- Financial management consultation and credit assistance
- Professional external evaluation
- Extensive support from communications professionals overseen by RWJF communications officers
- Re-branding and name-changing consultation.

In describing RWJF’s connection with Playworks, Executive Vice President James S. Marks emphasized “the notion of play as a central way that kids develop socially—that it isn’t frivolous, it is a central part of good development. And so for us, this intervention, this approach, mixed health and learning and social maturity.”

While major RWJF support for Playworks ended in 2015, the ties forged among the key players during this time remain strong today. And Playworks has evolved from a part-time program to fix recess in two local schools into a national organization poised to infuse its message of play as a foundation for social and emotional development, civic engagement, and, indeed, a Culture of Health throughout the United States.

## A SCALABLE IDEA MEETS A FRAMEWORK FOR SCALING

*“We learned how long, gnarly, and intensive a road it is to bring something to scale. To say that you’re in the game of scaling as a funder means that you have to be committed to it over that very long and intensive road.”*

*—Susan Promislo, Former RWJF Communications Officer*

### Scaling vs. Growth

In the business world, “[g]rowth means adding revenue at the same pace you are adding resources; scaling means adding revenue at a much greater rate than cost.”<sup>12</sup> Nonprofits typically view scaling as a way to multiply the impact of the intervention and also to reap the practical benefits that can accrue from implementing a working model in another setting, rather than starting from scratch, and from sharing resources and procedures as part of a larger network.<sup>13</sup>

Just adding more sites or replicating a program or intervention over and over again at the same cost and effort is not scaling. Attention to scaling in the nonprofit sector, particularly among social entrepreneurs, is itself expanding, with an associated literature to inform those trying to decide if scaling is right for their organization.<sup>14</sup>

Scaling must begin with a scalable idea.

### *It Starts with a Scalable Idea*

Playworks began with a simple idea: provide structured play during elementary school recess periods that engages all children—outgoing/shy, athletic/sedentary, big/little, high energy/low energy, popular/not-so-popular—by offering a varied set of games, ensuring that everyone is included, and giving kids the tools to resolve conflicts and keep playing. And have an adult coach model behavior, teach the games, and oversee the recess, but turn over leadership of the activities to trained fourth- and fifth-grade junior coaches.

The goal was to avoid recess battles and return kids to the classroom ready to learn. This simple idea was a common sense solution to the recess problem.

---

<sup>12</sup> Carucci R. “Midsize Companies Shouldn’t Confuse Growth with Scaling.” *Harvard Business Review*, July 25, 2016.

<sup>13</sup> Harris, E. “Six Steps to Successfully Scale Impact in the Nonprofit Sector.” *The Evaluation Exchange*, vol. XV (1): Spring 2010.

<sup>14</sup> See, for example: *Scaling Impact: A Primer for Nonprofits*, from Ventureneer, “Scaling Impact: How to Get 100X the Results with 2X the Organization” by Jeffrey Bradach in the Stanford Social Innovation Review (2010), or *Transformative Scale: The Future of Growing What Works*, a report from the Bridgespan Group and the Stanford Social Innovation Review (2014).

**But the simplicity of this idea belied its bold objective: to use the power of play to contribute to children's social and emotional development.** As a result, the true beauty of this simple idea is that, more than just solving the recess problem, **it teaches children how to self-regulate, how to organize, how to collaborate, how to work in teams—those executive function skills that have been shown to be critical to one's success as an adult.** “Kids don't like to take turns and follow all the rules, but they will in the context of play,” Barrand pointed out. “Kids don't always want to share and include others, but they will if it means they get to play a game. And kids don't want to be told to ‘exercise,’ but they willingly get most of their physical activity from play.”

Principals, teachers, recess aides, office staff, all suffer the problem of chaotic recesses that result in over-wrought students requiring precious class time for calming before any learning can take place. And they all understand the importance of social and emotional development. **They want a solution—Playworks is that solution.**

And most important, kids love Playworks. They have fun, they are engaged, they don't fight, they like the coaches. Recess is better than whatever was happening before Playworks. **Kids want Playworks.**

Furthermore, principals are willing to spend very scarce funds on Playworks because it both solves the recess problem and reclaims otherwise lost teaching time. **There is a business model that works.**

And it turns out that **this simple idea has enormous potential to make a difference in children's lives and in their families and communities now and in the future.**

Children actually do return to class alert and ready to learn. They also get more physical activity, use conflict resolution techniques off the playground as well, engage in less bullying, learn to cooperate, and are less likely to be suspended from school. Teachers gain valuable teaching time. More broadly, the kids develop critical social and emotional skills and become better prepared to be engaged citizens for the future.

A simple idea, one that solves a real life problem existing in communities throughout the country that people want solved, with long-term positive outcomes for kids, and with a business model that generates earned revenue = **a scalable idea.**

**Playworks is that simple, scalable idea.**

### ***The Framework for Scaling***

The following framework emerged as the essential lesson of the case study. It organizes a fluid, uncertain, and at times, volatile experience into a set of components that were not only necessary for Playworks' own scaling success but are potentially applicable more generally to the subject of scaling an idea, particularly in a nonprofit setting. It integrates

the perspectives and experiences of the small army of people who devoted expertise, time, and great interest to Playworks over two decades.

As exemplified by the Playworks experience, to scale—to build a movement—to bring an idea from initial conception to embedding it in people’s thinking and actions requires seven elements:

1. **Dynamic leadership** to inspire the effort and highly capable **management** to guide it.
2. A **strategy for growing and scaling**.
3. Expert, ongoing **financial analysis and oversight** to ensure viability over the long-term.
4. Well-constructed **evaluation** to provide evidence that the idea works in practice.
5. A **strategy for effectively communicating** the idea to the right audiences.
6. A solid, comprehensive **organizational infrastructure** to support the effort.
7. A network of stable, dependable, and trusting **relationships** to undergird the effort and provide a safety net in difficult times, a cheerleading squad in unsettled times, and a celebratory troop when it’s time to applaud.

The following is an analysis of the Playworks experience using this framework, and including lessons and insights that emerged.

## 1. Leading and Managing

*“They were applying a lot of rigor to  
the kinds of play they were introducing.  
Passion mixed with rigor is a really wonderful recipe.”  
—Dru DeSantis, Branding Expert*

### **Leadership and Management: Necessary and Complementary**

Inspiring leadership and highly capable management are the bedrock of any successful organization. Without these, the good intentions of internal staff and external supporters and infusions of funding and outside expertise will not take root, and even the most appealing idea will not take off and flourish.

The importance of top level leadership and management cannot be overstated. “Their [Violet and Cushing’s] leadership has been the most important input because even with all the money it would have failed without that leadership,” said Kim Tanner, executive director of the Jenesis Group (a leading funder of Playworks) and a former Playworks board member.



While Playworks is now viewed by many as a prime example of both energizing leadership as well as top-notch management, the path to get there was not always smooth.

As with many start-up organizations, Playworks began with one individual's idea—in this case, Jill VIALET's idea to fix recess through structured, inclusive play. For over a decade VIALET was the founder, leader, manager, and fund raiser for the organization. Playworks was able to capitalize on her talent as a “visionary ... a beacon of play and Playworks,” as communications strategist Eric Antebi described her.

Playworks was a small organization with fewer than a dozen employees in the central office and had a culture of promotion from within. When the organization, under the first RWJF grant, expanded to the East Coast, individuals were promoted to fill the new roles that resulted (financial manager, regional managers, etc.). In many cases, these individuals were not prepared to take on the new position and, “while Playworks got up and running quickly and the program was well-received by the schools,” said Barrand, “the back office operations were not up to the task. In retrospect, we did not appreciate the need to build the capacity of the organization before asking them to replicate.”

This experience made it clear to VIALET that operational management was not her strength and set in motion changes to her role and that of others to establish a solid professional operation. RWJF's Jane Lowe noted that “What made Jill a great leader was her ability to recognize her strengths and weaknesses and allow others to help her structure and manage the organization.”

As the organization grew so did the need for a strong overall managerial leader, someone who grasped the fundamental vision of Playworks but had the capacity to run the operation both day-to-day and with an eye to the long-term. Different individuals took on varying management positions, but nothing quite stuck.

In the years after Elizabeth Cushing joined as director of evaluation in 2004 her role at Playworks evolved and expanded as the needs of the organization changed. Her involvement intensified, while she kept learning—about Playworks, about managing an organization, about finance, communications, evaluation. She moved through a number of titles: director of special projects, chief strategy officer. Then in 2011 the board asked Cushing to take on the role of president and chief operating officer. She jumped at it.

During this time, as Cushing's experience and skills grew, VIALET became increasingly comfortable with her own changing role as founder and CEO that drew her away from operational management and allowed her the time and focus to be the inspirational leader of and spokesperson for Playworks.

“Jill did not allow herself to succumb to so-called ‘founder's syndrome’ and did an extraordinary job of balancing her original vision of the program with what the program

wanted to become,” said former RWJF Communications Officer Ann Christiano, MPAP. “She recognized her importance to the charisma of the program, but modulated her involvement and made room for other people to help, which is not something that founders are very good at.”

Violet described the two leadership roles: “Elizabeth obviously runs the place and she’s a tremendous leader around execution, with a lot of vision moving forward, and really good at managing—which is a real thing. I have more time, more free space to think and write and speak publically, and I think that’s right.”

Over Playworks’ two decades the organizational structure has grown exponentially, with strong managers in a wide range of functional areas. Violet and Cushing continue to provide the leadership and management that has allowed the organization to grow and to scale and that has been and continues to be fundamental to Playworks’ success.

### **Lessons and Insights: Leading and Managing**

#### ➤ The Importance and Role of Leadership

- **Leadership is critical to the success of any organization.** The strong leadership of Violet and Cushing has clearly been pivotal, and more important than any other factor, to the success of Playworks.
- **The key role of leadership, ultimately, is to move beyond the original idea to implementation and large scale social change.** “The number one thing I learned with Playworks is: this is not about an idea at all,” said Jennifer Hoos-Rothberg, MRP, executive director of the Einhorn Family Charitable Trust, another major funder of Playworks. “This is about implementation. There is a gap between a good idea and actually getting large scale social change.”

#### ➤ The Enduring Value of a Visionary Who Did Not Succumb to “Founder’s Syndrome”

- **In many organizations with a charismatic founder that individual has a great deal of difficulty relinquishing direct hold on the operation and sorting out her or his most useful place.** While it took time and was not always easy, Violet is seen as having been able to do this, with great benefit to Playworks. She is viewed as a true visionary who inspires others, but who is aware of her own strengths and weaknesses and willing to make way for others who are expert where she is not.

#### ➤ The Fundamental Worth of a Strong, Talented Chief Operating Officer

- **Not only is Elizabeth Cushing thought to be an exceptionally talented leader and manager, but the fact that the number two person is so well-regarded is a major positive for the organization.** A strong COO, particularly one who can work so well with the CEO, is considered to be especially important to an organization’s success.

As Hoos-Rothberg said: “Reaching the goal? Number two is critical.” And in Antebi’s view: “The CEOs get all the glory, but the COO is really the ticket.”

## 2. Developing a Strategy for Growth—With an Eye to Scale

*“After all the years of hard work, now you get to do the fun stuff. This is the stuff that everyone wanted to do from the get-go, but you don’t get to do that—you shouldn’t get to do that—until you’ve done the hard work.”*

*—Roger King, Strategy Consultant*

### **Thinking and Planning Strategically**

Although there was talk early on about scaling Playworks, “Jill did not have a plan for scaling,” said Barrand. “We settled on first testing whether Playworks could be replicated outside of California.” Thus, the first RWJF grant<sup>15</sup>, which began in November 2005, supported Playworks’ expansion to three cities on the East Coast: first Baltimore, and then Boston and Washington.

Before moving beyond those cities, there was a critical need to get a strategy in place that addressed Playworks’ aspirations for growth and eventual scaling as well as the promotion of a robust and resilient infrastructure. Violet turned to Roger King, MBA, for guidance and counsel in developing this strategy.

King, a former Bain & Company consultant, was then an independent consultant to nonprofit organizations and foundations, with a specialty in organizational scaling.<sup>16</sup> King spent an intensive year (2006–2007) with Violet and Cushing, identifying and building on what had been learned and defining where they wanted to go. This work provided a basis for the second RWJF grant application, which addressed how to grow from a handful of cities to become a more widespread operation, although not yet moving to the scaling phase.

As part of that effort King called some 30 school principals across the country who were unfamiliar with Playworks and asked about their recess. Almost uniformly they told him how much they hated recess, how dysfunctional it was, and how they would do anything to fix it. This was an “a-ha” moment for King where he realized Playworks had a scalable business model that addressed a real and pressing need in the field.

King maintains that before you actually get to a movement you need a solid base, with base-building typically lasting five to 10 years and requiring a lot of money. It also

---

<sup>15</sup> [Grant ID 53552](#), Phase 1, \$4,421,874, from November 1, 2005 through June 30, 2008.

<sup>16</sup> King is currently (September 2017) President and CEO of the Center for the Collaborative Classroom.

requires extraordinary attention to execution and management, which many nonprofits aren't good at. "People want systemic change for free," he said, and don't want to do the hard work. "Roger really taught us how to scale and it helped us develop our grant-making strategy for identifying good models at different stages of growth that had the potential to scale," said RWJF's Jane Lowe. "Our experience scaling Playworks helped to inform our investments in many other programs."

The other important result of building the base is acquiring the credibility that comes with knowing that the program works in many different settings and is not dependent on a single leader, funder, or set of idiosyncratic circumstances. Time is needed for rigorous evaluation that demonstrates this capacity. (Playworks' evaluation activities are described in [Evaluating the Practice of Playworks](#) below.) "You can't just develop a strategy of building a movement right from the start," said Violet. "You have to have proof on the ground that it works. And then you need a broad adoption strategy that follows. The movement to really achieve something just takes time and hard work."

In a meeting at RWJF in November 2007, King, Violet, and Cushing presented three options for Playworks:

- The first, dubbed "Flagship," involved growing the organization with an eye toward building a platform that would be big enough and clear enough to galvanize people for the next phase.
- The second option, "Movement," departed from the existing approach and gave the Playworks model away—helping others to do it rather than focusing on Playworks providing the program, so quickly having a type of Playworks in many more sites.
- The third option would be doing both at the same time.

King, Violet, and Cushing persuaded RWJF's Barrand and Lowe to concentrate first on "flagship." Barrand and Lowe took forward a grant request of \$18.7 million<sup>17</sup> allowing for major expansion, with a goal of reaching 650 low-income schools in 27 cities. "The challenge for us" said Barrand, "was how to present a 20- to 30-year plan for scaling and provide the necessary support to put it in motion in a world of philanthropy where grants were made in two- to three-year increments and renewal funding was frowned upon."

Playworks sent staff around the country, talking to principals and determining where there was sufficient interest. Violet gave talks to bring attention to Playworks. In cities that looked promising Playworks sent a group of eight coaches to spend a week, each at a different school, demonstrating the program. Schools experienced Playworks for five days and "by the sixth day," Cushing said, "people were hooked." If five or six schools in an area could be signed up and were willing to pay, Playworks opened there.

---

<sup>17</sup> [Grant ID 63981](#), Phase 2, \$18,734,344, from July 1, 2008, through May 14, 2012.

By 2011, Playworks had met the flagship criterion and was ready to turn to broad adoption—growing to many more schools in a shorter time with lots less money. This meant doing business differently. It was time to expand the training of school personnel to conduct the program themselves and to begin to launch a movement of parents, teachers, and principals to bring attention to the value of recess. RWJF supported this third phase with a grant of \$8.5 million.<sup>18</sup>

In 2017, Playworks is poised to start to build the movement. With a \$43.3 million budget, Playworks now reaches more than 700,000 students directly and through training services and serves over 1,300 schools in 23 communities. This budget includes \$13.8 million (31.9%) in fundraising (foundation, corporate, individual, and event) and \$29.5 million (68.1%) in school fees, government grants, training fees, in-kind revenue, and growth capital revenue. Playworks creates 250 AmeriCorps positions for coaches at its schools.

“We’ve always kept our eye on that basic vision that inspired us in the beginning,” Violet stressed. “Then very intentionally we have been learning along the way about how one grows an organization and impacts systems change. So there’s been a lot that’s organically developed but because we intentionally set out to organically grow it.”

### **Lessons and Insights: Strategy Development**

#### ➤ **The Overarching Need for Strategic Thinking**

- **Strategic thinking is critical to growth and scaling.** It doesn’t have to come from an external consultant if someone in-house is able to do that. But often with nonprofits that is not the case. Many nonprofit organizations are started by people who have neither strategic nor management experience.

#### ➤ **Growing ≠ Scaling.**

- **Knowing the difference between the two, and how one can prepare an organization for the other, will lead to a more workable strategy.** You have to grow before you have anything to scale.
- **Learn early whether the model works.** If not, fix it or find something else to do. Determine whether an organization will just grow or if there is a realistic chance of true scaling.
- **Scaling does not mean building a massive operation that reaches everywhere.** It means socializing the concept, demonstrating the power of the model so it becomes standard operating procedure.

---

<sup>18</sup> [Grant ID 69844](#), Phase 3, \$8,488,328, from May 15, 2012, through June 30, 2014. This grant was part of Playworks’ first capital campaign, which raised a total of \$26.4 from multiple foundations. These foundations became the Growth Capital Investors Group.



➤ Time—A Lot of Time.

- **Growing an organization to the point where it can credibly consider scaling takes a great deal of time.** Everyone needs to be prepared for that.
- **Building the service base can take five to 10 years. The next phase, broad adoption, another five to 10 years. Then you can start building a movement.** People are naive if they think meaningful societal change will occur with anything less than that.

➤ A Time for Deliberate Strategy and a Time for Emergent Strategy.

- **Whether a deliberate, highly engineered strategy (full of metrics and detailed plans) or a nimble, “let things evolve” approach is more appropriate often depends upon where the organization is along the building-the-base, broad adoption, building-a-movement continuum.**
- **In the early years, as the model is being refined and the organization is getting a foothold, a loose and nimble style can be most advantageous.** Later, when about to spend a lot of money (particularly someone else’s money) and rolling out into multiple locations, a careful and deliberate plan is likely the way to proceed. Finally, when into movement-building, the organization is guiding it and inspiring it—but not controlling it—and an adaptable, flexible, emergent strategy will serve best.

### 3. Ensuring Financial Viability

*“In an organization pursuing growth it’s great to have a visionary. It’s great to have a wonderful strategy. But you also need to have astute financial management to navigate financial challenges.”*

*—Peggi Einhorn, RWJF CFO*

#### **The Business Model and the Importance of Credit**

Having a strong financial management function was not an initial priority at Playworks. But, said RWJF CFO Peggi Einhorn, MBA, “Playworks leadership realized through painful lessons the centrality of finance to rapid organizational growth.”

Scaling meant building a national office with an administrative infrastructure to bring Playworks to new cities and to manage a large decentralized organization. It meant building a fundraising capacity to fund the national office and subsidize regional offices until those sites could cover their costs through school fees and regional fundraising. It meant growing an operating budget from \$3.8 million at the time of the first RWJF grant in 2005 to over \$40 million today (2017). And it meant securing and managing sizable lines of credit.

Early on, Violet and Cushing understood that they had an income-generating business with a classic cash flow timing issue. Schools pay a fee for Playworks, with payments made well into the school year, months after Playworks has had to outlay cash for many expenses. Late-paying schools increase the reimbursement time further.

As the number of schools increased, the growing need for credit to bridge cash inflows and outflows was one of the first painful financial lessons for Playworks. And so was the need to establish a robust discipline around collecting unpaid, overdue bills.

Prior to 2007, Playworks had a \$750,000 bank line of credit to help cover cash needs. This was adequate when Playworks was in a small number of schools, but as Playworks grew, the need to bridge-fund the cash gap grew as well.

By spring 2007 the organization, with a \$1 million receivable from its schools and limited cash, was in great danger of not making payroll. Violet and Cushing reached out to RWJF's Nancy Barrand, who in turn reached out to RWJF CFO Einhorn; Director of Program Financial Services Janice Opalski, MBA; and Associate General Counsel Ed Ghisu, JD. The group explored structuring a line of credit to finance accounts receivable (unpaid school contracts). While banks were unwilling to lend or to lend enough at an acceptable rate, the Jenesis Group was willing to partner with RWJF to provide modest lines of credit to resolve the crisis and address the current working capital need.

"It was incredibly helpful having finance and legal partnering with program to find a solution to help Playworks" said Barrand. "Historically, finance and legal getting involved in a program usually meant a project was in trouble and the grant needed to be closed." But instead, solving the financial problem for Playworks became a team effort across the Foundation.

Once Barrand proposed the large, \$18.7 million authorization to scale Playworks nationally, the finance and legal staff became even more deeply involved with the Playworks relationship. The authorization included grant funding and also provided up to \$5 million for a working capital line of credit.

Working with an outside consultant the finance and legal team determined that the goal of 700 schools could result in a borrowing need of up to \$6.5 million. While RWJF could provide a sizable amount, Playworks would need additional avenues for borrowing. That conclusion drove the structure of the loan RWJF provided, which was supplemented by an additional line of credit from the Jenesis Group.

RWJF felt that it was important for Playworks to solidify a relationship with a traditional lender. "Doing so," said Einhorn, "would pave the way for ongoing access to lines of credit in the future, with or without Foundation support." Going with a traditional lender

meant undergoing a bank's due diligence process and then ongoing monitoring, compliance with strict loan covenants, and payment obligations.

A structure was developed that provided Playworks with a \$3.5 million line of credit on August 20, 2009, from OnePacific Coast Bank<sup>19</sup>. The line was fully secured by a deposit from RWJF that was below market rate, thereby qualifying as a program-related investment and counting against the Foundation's payout requirement.

### ***The Value of a Team-based Monitoring Approach***

With the new grant and loan in place, a cross-functional financial monitoring approach was established to review the financial health of the organization on a regular basis. This approach included telephone meetings between Playworks (Violet, Cushing, and the controller/CFO) and RWJF (Barrand, Einhorn, Opalski, and Ghisu) to review Playworks' quarterly board materials, including a report to the finance committee. Submission of the quarterly board materials to RWJF was a requirement both of the grant<sup>20</sup> and of the deposit account. The RWJF team believed that review of these materials was "the best window into Playworks' organizational challenges and financial status and what the Playworks board was most focused upon in governing," according to Einhorn.

The quarterly meetings solidified the RWJF/Playworks relationship. RWJF took a consultative approach to monitoring Playworks, providing a sounding board and guidance—especially important when its internal financial expertise was not yet strong enough. In turn, Playworks responded with transparency and the willingness to listen, learn, and adapt. This openness allowed for real dialogue and enabled the Foundation to be supportive and, where necessary, adjust expectations.

During these quarterly calls, Einhorn helped to mentor Cushing. "When Playworks found itself in a cash-flow crisis, Peggi stepped in to help inform our plan to get out of it," Cushing said. "After that, Peggi became an important mentor for me around our financial model and how to think about both the risks and the opportunities inherent in rapid growth. Her guidance was a key source of learning for me in my role."

### ***Analyzing and Understanding the Flow of Cash In and Out***

"At no time was the strong RWJF/Playworks relationship more important than during the period between 2010 and 2014," Einhorn stressed. "These were the most difficult years for the organization's scaling."

---

<sup>19</sup> OnePacific Coast Bank was known as OneCalifornia Bank in 2009.

<sup>20</sup> RWJF requests board materials when its grant is a significant portion of an organization's operating budget, its program-related investment is critical funding for the organization, and/or there are issues related to organizational sustainability, often during times of change and decreasing RWJF funding.

Playworks was continuing to grow and to demonstrate strong positive outcomes in evaluation studies (see [Evaluating the Practice of Playworks](#) below), but cash flow challenges were occurring on a daily basis. The organization needed to raise considerable funds to support the national office and to subsidize the regions, particularly newer ones whose local fundraising efforts had not yet matured. And fundraising at the national level was neither quick nor easy even with an energetic, charismatic leader.

Foundations and corporations were just beginning to recover from the national financial crisis, which posed yet another fundraising challenge. And with expenses incurred early in the school year, there was little flexibility to adjust spending when revenues fell short.

The Foundation saw the financial risks before Playworks fully understood them. The clue was how the line of credit was being used. RWJF legal and financial staff found that, while the line was bridging working capital needs related to school and government contracts as intended, it was also increasingly being used to cover expenses that Playworks staff hoped to eventually cover through discussed—but not yet pledged—grants from other funders. When such grants were not forthcoming (or were delayed), the fallback was asking RWJF and other funders to cover costs by providing the next installment of their multi-year grants earlier than planned.

When presented with the analysis Cushing quickly understood that covering fundraising shortfalls by drawing on the lines of credit and accelerating grant payments put Playworks on an unsustainable path. She also recognized the limitations of her own internal financial staff as, ideally, such analysis should have come from them. “Elizabeth is very smart,” said Einhorn, “but she didn’t have very good financial support under her.”

### ***Formalizing Investor Support to Raise Growth Capital***

Despite persistent cash flow challenges, there were bright spots between 2011 and 2012. RWJF and Playworks began discussing the concept of growth capital—funding meant to cover “the deficits a firm incurs en route to sustainability.”<sup>21</sup> At RWJF’s suggestion, and with the enthusiastic support of Jenesis and Einhorn<sup>22</sup> Family Charitable Trust, Playworks began to prepare for a growth capital campaign. The campaign was launched in 2012 with a goal of raising \$26.4 million. RWJF made a grant toward this of \$8.5 million.<sup>23</sup>

The three investors formed the base of a Growth Capital Investors Group. The group took hold and has become a key source of guidance on program strategy, fundraising strategy, and the business/financial model. The group provided Violet and Cushing with the

---

<sup>21</sup> Overholser GM. *Nonprofit Growth Capital: Defining, Measuring and Managing Growth Capital in Nonprofit Enterprises; Part One: Building is Not Buying*. New York: Nonprofit Finance Fund, 2005.

<sup>22</sup> No relation to RWJF CFO Peggi Einhorn.

<sup>23</sup> This is the Phase 3 grant, [ID 69844](#), from May 15, 2012 through June 30, 2014.

collective confidence and support to define success as *impact*, not the number of schools. This freed Playworks to consider alternatives to achieving impact with less financial risk.

The Growth Capital Investors Group grew to include the Atlanta Falcons Youth Foundation, the Laureus Sport for Good Foundation, the Rainwater Foundation, and the S.D. Bechtel Jr. Foundation—all of which were or continue to be Playworks funders.

### ***Navigating the Financial Rollercoaster***

In 2011, during a short period of financial stability, Playworks began negotiating a new loan structure that set up a separate \$1 million line of credit secured by Playworks' accounts receivable. RWJF was pleased that the bank felt Playworks creditworthy enough not to require additional security from the Foundation. Thus, the new structure allowed RWJF to reduce the program-related investment from \$3.5 million to \$2.5 million.

But, noted Einhorn, “the truth was that all was not well.”

Within six months of the new loan closing Playworks again needed the Foundation to accelerate grant payments in October of 2011. According to Einhorn, “One could argue they had simply recycled our funds: reducing our deposit earlier in the year, then getting those funds back by accelerating grant funds later in the year!”

The situation became even more precarious in 2012 and 2013. Playworks was in a persistent crisis as fundraising could not keep pace with the daily cash demands of scaling.

In September 2012, Playworks needed to increase the OnePacific loans, so RWJF restored the deposit to \$3.5 million. And the Foundation agreed to accelerate grant payments twice more, in November 2012 and in June 2013.

The June payment was particularly important since Playworks' fiscal year ended June 30. Without those additional funds, its financial audit would reflect a negative net asset balance. This meant the organization was at risk of receiving a “going concern designation” from the auditors, which would indicate that its sustainability was at risk. Playworks would also be out of compliance with OnePacific Bank loan covenants.

The Foundation understood “that these problems were not unusual for an organization experiencing rapid growth,” said Einhorn, and the commitment to Playworks was firm. “We didn’t want them to curtail their ambitions, but we did want them to calibrate growth in the short run and to have contingency plans. We also wanted them to hire a high-level, knowledgeable financial executive.” To that point Playworks had had two chief financial officers (and earlier a finance manager), but neither had the level of experience and expertise needed for this growing and increasingly complex organization. RWJF also

wanted Playworks' board more directly involved in providing financial guidance to Violet and Cushing.

As a result of these concerns, RWJF required that Playworks develop a formal contingency plan, approved by the Playworks board, as a prerequisite to renewing the program-related investment, which was coming due at the time.

### ***Turning the Corner with Strategic Financial Management***

David Carroll, MPP, joined Playworks as its third CFO in August 2013 and things began to turn around. Carroll brought experience in nonprofit financial management and was drawn to Playworks by its program and by the financial challenge it presented.<sup>24</sup> “At some point you have to marry the financial sustainability with the program for it to work,” he said. Shortly after Carroll joined, in another positive sign, the board formed a subcommittee to work closely with management on a contingency plan.

Using a “what if?” process Carroll helped Violet and Cushing think through a plan that addressed what could go wrong, what was most likely to happen, and what could be done about any of that. The contingency plan was presented to and approved by the Playworks board on November 14, 2013.

Carroll also began to explore ways to alter the business model to provide more financial flexibility and sustainability by analyzing the impact of options that Playworks leaders were considering, such as one coach for multiple schools, improved training services, etc.

With this new sense of financial control RWJF staff was able to moderate its own close financial monitoring of Playworks.

### ***Leading the Way for Other Investors***

RWJF's large investment in Playworks was initially seen as “casting something of a shadow” on other potential funders, said Violet, with some smaller foundations believing that Playworks no longer needed their help.

At the same time, RWJF's endorsement of Playworks set the stage for the entry of several key investors who considered RWJF's involvement as a vote of approval that encouraged their investment. “We felt like it created a very unique niche for us to be supportive in a different way and be in a partnership with RWJF,” said Jenesis' Kim Tanner.

Jenesis Group and the Einhorn Family Charitable Trust, became—and continue to be—major supporters of Playworks, not only making significant grants over multiple years,

---

<sup>24</sup> Carroll was CFO until August 2015 when he left Playworks to become Senior Vice President, Finance and Administration/CFO of the Jewish Community Foundation of Los Angeles. He was succeeded by current (September 2017) CFO Tom Low.



but also providing important advice and counsel and establishing strong and trusted relationships with Playworks. Noted Einhorn's Jennifer Hoos-Rothberg, "It's important for philanthropy to see that funders can exit and other funders can enter and there are different places and times for different funders."

These other investors have made significant financial contributions to Playworks over the years. As well, the revenue from AmeriCorps and school contracts have continued to grow. While RWJF has been Playworks' largest philanthropic funder, at no time was the Foundation's contribution more than 38 percent of the total Playworks budget. Earned income has provided a consistent 42 percent to 55 percent of total revenue over many years. (See [Appendix B - Playworks' Revenue History: Fiscal 2007 – 2016](#).)

### ***Landing in a More Secure Financial Present and Future***

By 2014 Playworks had capable financial staff and a new board chair who had considerable financial savvy. While not completely stable, it was no longer in the critical state it had been.

RWJF funding was scheduled to end in 2015, so Barrand, Einhorn, and Ghisu began to consider options for the program-related investment. Once the grant closed, they didn't want to renew the deposit indefinitely.

RWJF was especially focused on the on-going financial health of Playworks. So the decision was made to turn the deposit into a grant but under one condition: that it be used as a board-restricted reserve fund. The result was the Board-Designated Sustainability Fund,<sup>25</sup> which moved governance of these funds from RWJF to the Playworks board. Playworks submitted a policy for the fund approved by its board to RWJF, as required. This step also added \$3.5 million to net assets, making the financial condition more attractive to funders and lenders.

Barrand and Einhorn continue to attend the Growth Capital Investors Group meetings, even though RWJF is no longer an active funder. The fiscal 2016 audit showed Playworks to be in a solid financial position, with \$5 million in credit availability and no outstanding debt.

### ***A Cautionary Note***

As Playworks' major source of philanthropic funding from its first involvement through fiscal 2011 (See [Appendix B](#)), the decline in RWJF support starting in 2012 contributed to cash flow stresses, with 2012 to 2014 being the "hardest years for Playworks financially," Einhorn pointed out.

---

<sup>25</sup> [Grant ID 72000](#), \$3,502,878, from June 23, 2014 through June 22, 2015.

With the significantly strengthened financial management structure in place, several factors were key to the subsequent stabilization of Playworks' fiscal picture as RWJF's financial support lessened. Earned income, with the assistance of product innovations such as TeamUp and Playworks Pro (Playworks' training services), grew more rapidly than fundraising revenue over the five-year period through fiscal 2016. National fundraising increased over the same period with the support of several large funders, most importantly the Einhorn Family Charitable Trust. And regional fundraising strengthened significantly, accounting for 65 percent of total fundraising in fiscal 2016.

As a result of this experience, Einhorn offered this cautionary note relative to a funder's involvement in the building of a nonprofit and the inevitable pulling away of that support: "It takes longer and is harder than 'elegant business plans' suggest. And it requires that organizations and funders be nimble and flexible."

### **Lessons and Insights: Financial Management**

#### **➤ Overriding Financial Lessons**

- **Scaling an organization involves serious financial risks and is not for the faint of heart.** It is critical that organizational leadership and funders be aware of and analyze these risks thoroughly and on an ongoing basis, from the start.
- **The key focus must be on cash flow.** Projecting revenue and expenses is important, but insufficient. Real attention must be on budgeting and forecasting monthly cash flow. This will help determine where and when risks may occur, such as a delay in receiving cash from expected grants, and their potential effects on payroll, loan drawdowns/repayments, etc.
- **Organization leaders cannot be wedded to a single business model.** Program design drives financial risks. Organizations must be willing and able to adapt. There is no program impact without financial sustainability.

#### **➤ The Importance of Financial Management Infrastructure**

- **The need for an astute and experienced CFO cannot be stressed enough.** The individual must be financially savvy, but also strategic and skilled in managing through ups and downs. The CFO must become a trusted advisor to leadership, a credible voice to the board and funders, and a collaborative partner across the organization.
- **Ongoing and thorough financial analysis should be routine.** The need for this must not be underestimated. Forecasting is critical and must reflect bottom-up analysis as well as discounting of assumptions and scenario analysis. Contingency planning must be built into the budgeting process each year.
- **Budgets are organizational tools, not financial tools.** Discipline around goal-setting is key and fosters accountability at every level of the organization.

### ➤ The Role of the Board in Financial Oversight

- **The organization's board must be closely engaged in the financial performance of the organization.** Its role is not limited to program and strategy. There must be an active finance committee asking probing questions and providing guidance.
- **A major outside funder must understand how the board oversees the organization and how management reports to the board.** Review of board materials provides important clues to the board's focus and to governance strength.
- **Funders can enhance board engagement and management discipline through collaborative steps.** Having the board approve a contingency plan, or oversee the use of a long-term reserve fund, can foster stronger discipline, deeper oversight, and closer relations between management and the board on financial matters.

### ➤ The Value of Building Discipline around Bank Credit

- **Understanding and becoming disciplined about the use of lines of credit from banks will serve an organization well over the long term.** Banks tend to have stricter requirements attached to their loans than program-related investments from foundations, which typically offer more latitude. Developing the discipline to meet bank requirements helps ensure that an organization would be able to take advantage of a bank line of credit when needed.
- **Foundations can structure program-related investments that help build banking relationships.** A below-market-rate deposit securing a bank line of credit is one such example. It provides the organization access to a line of credit from a traditional lender while counting against the foundation's 5 percent payout requirement (similar to making a loan directly to the organization).

### ➤ The Importance of Major Funders Understanding Organizational Health

- **Funders making a significant investment in an organization need to monitor financial progress at the organizational—not grant—level.** A much stronger and more realistic view of the financial situation will be apparent. This may help minimize the potential for serious financial problems to grow before anyone is aware.
- **Funders may gain the most insight by reviewing management reports to the organization's finance committee and board rather than through reports created specifically for the funder.** These, along with review of board minutes, will provide the funder with insight into how the board is overseeing the organization and the quality of management reporting to the board.
- **Funders will benefit from a cross-functional team reviewing an organization's health.** Particularly when loans are involved, the combination of program, financial, and legal staff working together is ideal.

## ➤ The Value of Connection and Collaboration Between and Among Funders

- **The initial endorsement of one major funder can attract the attention of others and provide the comfort level they need to make their own significant investments.**
- **Collaboration among major investors is a way to provide the most comprehensive value to the grantee organization.** A growth capital investors group can be an effective way to do that.

## 4. Evaluating the Practice of Playworks

*“The model was being well-implemented in a variety of places so that we could properly test it.*

*It was a good bet for a really first rate study.”*

*—Laura C. Leviton, RWJF Senior Adviser for Evaluation*

### Early Evaluation Work

Evaluation has been critical to Playworks’ progress. Early evaluative work and other small surveys at individual schools helped establish an initial basis for credibility of the Playworks model and for RWJF’s decision to support the program and a more rigorous evaluation of it. This early work included:

- An evaluation of Playworks in Baltimore schools funded by the Open Society Institute-Baltimore in 2005 and 2006 found that schools that partnered with Playworks saw conflict resolution on the playground soar and suspension rates plummet.<sup>26</sup>
- During the 2006–2007 school year the Harvard Family Research Project evaluated Playworks at an elementary school in Boston. The study found that 83 percent of teachers said that student classroom behavior improved, 91 percent found kids more cooperative, and 75 percent said that playground conflicts were less likely to continue in the classroom.<sup>27</sup>
- In 2007, RWJF published a report, *Recess Rules: Why the Undervalued Playtime May Be America’s Best Investment for Healthy Kids and Healthy Schools*,<sup>28</sup> which showed that recess provided the most minutes of physical activity in a child’s day.

---

<sup>26</sup> See “Baltimore District Tackles High Suspension Rates,” *Education Week*, April 24, 2007.

<sup>27</sup> See *Evaluation Report: Case Study of the First Year of Sports4Kids at the Ohrenberger Elementary School in Boston, Massachusetts—2006–2007 School Year*, prepared by the Harvard Family Research Project, 2007.

<sup>28</sup> See *Recess Rules: Why the Undervalued Playtime May Be America’s Best Investment for Healthy Kids and Healthy Schools*, Robert Wood Johnson Foundation, 2007.

But while this work was important for Playworks to offer a credible case for funding as it sought to expand to new locations, more solid evidence was essential for widespread growth and eventual scaling. Rigorous evaluation was called for.

### ***RWJF Support of Evaluation***

RWJF Senior Adviser for Evaluation Laura C. Leviton, PhD, became involved with Playworks in 2008. “My first impression and lasting impression all these years of Playworks is of a visionary leader, Jill Vialet, and a consummately good executive director, Elizabeth Cushing, who is just wonderful,” said Leviton.

The value proposition of Playworks from the schools’ perspective was “crystal clear,” Leviton emphasized. But what was missing was evidence of reduced aggression, decreased bullying, increased physical activity, effects on classroom management, or any educational outcomes. And what was needed was a randomized experiment so that Playworks could receive federal endorsement, which comes only to those programs meeting a standard of evidence.

“Their model was being well-implemented in a variety of places which made it a good bet for a really first-rate study,” said Leviton. “And they were confident enough in the model that they were willing to have a randomized experiment where we could test some of what they believed they were seeing as benefits in individual schools.” Leviton also noted that, since there was a greater demand for Playworks than the supply of available coaches, a randomized experiment—“the gold standard for assessing outcomes”—was ethical.

First, RWJF funded an observational study of implementation at eight schools in the San Francisco Bay Area. Researchers at the John W. Gardner Center for Youth and Their Communities at Stanford University conducted the study, led by Rebecca London, PhD. The study identified key implementation factors such as early training of school staff, a strong coach, and school-related factors. The implementation affected students, adults, and school climate through increased structure and engagement at recess, reduced conflicts during recess and back in the classroom, an association with positive youth development, and other ways.

### ***Randomized, Controlled Evaluation of Playworks***

A cluster randomized trial of outcomes due to Playworks was planned, supported by RWJF. The outcomes of focus included:

- ***Bullying.*** Several uncontrolled observational studies of Playworks in the Bay Area and elsewhere indicated that Playworks may have had an impact on bullying.
- ***Physical activity.*** While recess time is generally short some of the structured play was moderately to vigorously active, leading to added minutes of physical activity.

- **Classroom outcomes.** Teachers had observed kids coming back to the classroom and settling down faster. “Because we know that giving a break from learning makes it stick better,” Leviton explained, “recess may serve as a way for kids to consolidate their learning before they get back to studying.” And research has indicated that physical activity has an effect on executive function.

Mathematica Policy Research led the randomized experiment.

During the 2010–2011 and 2011–2012 school years, researchers randomly assigned 29 schools either to a treatment group that implemented Playworks or to a wait-list control group of similar schools that did not implement Playworks.

The research team interviewed coaches, teachers, and principals; surveyed students and teachers; conducted focus groups with junior coaches; observed recess; and collected administrative data. They studied Playworks’ implementation and examined outcomes related to school climate, conflict resolution and aggression, learning and academic performance, youth development, student behavior, play, physical activity, and recess.

The Playworks evaluation produced a comprehensive set of findings about the many ways in which Playworks impacts outcomes for students and schools. A series of reports, from 2010 to 2013, details the evaluation and its findings. See [Appendix D](#) for a list of these evaluation reports with links to their availability on the RWJF website.

Overall, the study found that Playworks improved student outcomes in four domains: school climate, conflict resolution and aggression, physical activity, and learning and academic performance.

Specifically, the evaluation found the following key effects:

- **Less bullying.** Teachers in Playworks schools reported significantly less bullying and exclusionary behavior during recess compared to teachers in control schools—a 43 percent difference in average rating scores.
- **Increased feeling of safety at school.** Playworks teachers’ average rating of students’ feelings of safety at school was 20 percent higher than the average rating reported by teachers in control schools.
- **More vigorous physical activity.** Accelerometer<sup>29</sup> data showed that children in Playworks schools spent significantly more time (14%) engaged in vigorous physical activity at recess than their peers in control schools (10%)—a 43 percent difference. However, the actual time difference is likely small (e.g., with two recess periods of an average of 15 minutes each, the difference results in 4 percent of 30 minutes, or just 1.2 minutes).

---

<sup>29</sup> Accelerometers measure the force of acceleration, allowing them to sense movement, speed, and direction.



- **Enhanced readiness to learn.** Teachers in Playworks schools reported spending significantly less time (34% fewer minutes) to transition from recess to learning activities, compared to teachers in control schools.

### **Limitations of the Evaluation Work**

The evaluation work done by the Mathematica and Stanford researchers provided credible confirmation of Playworks' positive impact on a range of outcomes for students and schools. These results were useful not only to Playworks itself as it planned for the future but also were valuable when meeting with potential schools and as key supporting data in communications activities.

At the same time, the randomized, controlled experiment did not accomplish all that Leviton had hoped—in particular, the goal of inclusion of Playworks in the federal What Works Clearinghouse.<sup>30</sup> Mathematica is one of three firms that manage the Clearinghouse.

For inclusion in the Clearinghouse a program must meet rigorous evidence-based standards. The Playworks evaluation did not meet all of the Clearinghouse's standards for inclusion despite its strong findings. For example, while teachers' reports on the impact of Playworks on bullying showed “one of the biggest effect sizes in the bullying literature,” said Leviton, “this can't be included on the What Works website because it wasn't a teacher intervention,” which the Clearinghouse requires.

As a result Playworks has not been included in the What Works Clearinghouse nor in other repositories of best practices, a disappointing outcome that points to the need to be strategic when designing an evaluation—identifying broad goals upfront and ensuring that the evaluation will be able to meet those goals.

### **Current Evaluation Work**

RWJF also funded<sup>31</sup> an examination of the implementation of Playworks' TeamUp model in which school staffers are trained to provide recess programs and one Playworks coach oversees the programs in a “pod” of four schools. Rebecca London, now at University of California, Santa Cruz, led that study. An issue brief on the study,<sup>32</sup> authored by the study team, was published on the RWJF website in February 2017.

---

<sup>30</sup> The What Works Clearinghouse of the Institute of Education Sciences at the U.S. Department of Education is a key repository of educational programs, products, practices, and policies that can seek federal funds.

<sup>31</sup> [Grant ID 72828](#), \$151,500, from July 1, 2015 through December 31, 2016.

<sup>32</sup> London RA and Standeven K. *Building a Culture of Health Through Safe and Healthy Elementary School Recess*. Robert Wood Johnson Foundation, 2017.

Playworks supports an in-house evaluation staff that collects, analyzes, evaluates, manages, and reports on data from sites and regions. While an independent external evaluator is critical to study big questions related to program effectiveness and scaling, said RWJF Senior Learning Officer Tracy Costigan, PhD, “It’s good to have the internal capacity for research and evaluation. It is important for helping specific sites or regions with their own implementation and with organizational studies that look at different services in different regions and what works and what doesn’t work.”

### **Lessons and Insights: Evaluation**

#### ➤ Upfront Considerations in Evaluation Design

- **An evaluation design must be strategic and accommodate goals beyond the technical findings.** For example, a design should meet criteria for inclusion in a clearinghouse of best practices, if that is a goal.
- **Evaluators must thoroughly understand the related literature so that interpretation and presentation of findings will be accurate and comprehensive.** In the case of Playworks, where teacher ratings of bullying showed a difference from control schools but student ratings did not, the evaluators’ report did not address the literature that shows that teachers and students may view bullying differently.

#### ➤ The Value of Independent External Evaluation

- **An independent external evaluation offers credibility that will not be associated with an internal evaluation.** External evaluation is especially important for convincing third parties of a program’s effectiveness.
- **When addressing broad questions related to effectiveness and scaling an external evaluator can provide critical expertise and insight.**
- **A third party (e.g., a funder) can monitor and manage evaluations when that capability is not available within the grantee organization.**

#### ➤ The Place for Internal Evaluation Capacity

- **Internal evaluation capacity has value for addressing a range of process and program improvement questions.** These include: assisting regions in assessing their own implementation; examining services in different regions and what works and what doesn’t; determining the capabilities needed to establish a service; analyzing the knowledge and skills needed for staff selection; and other organizational concerns.

#### ➤ The Place for Evaluation in Growing an Organization

- **It is critical to know that a program works before attempting significant growth.**
- **Research and evaluation findings can be invaluable to effective communications about the impact and worth of a program.**

- It is important to ensure that evaluation and communications are each introduced at the most appropriate and beneficial time.

## 5. Communicating the Idea

*“When you show people solutions it changes how they approach entire issues. That was a lot of what we were doing: reinforcing that this makes a difference, is working, is cost-effective, has all these benefits. That’s the overriding thing that communications did.”*

*—Eric Antebi, Communications Strategist*

Ann Christiano<sup>33</sup> was the communications officer for Vulnerable Populations when RWJF began to support Playworks. Nancy Barrand came to her early on and said that Playworks needed Christiano’s help. Describing Playworks’ value so that others understood it would be as important as funding, Barrand believed. Christiano was quickly on board. “Many program officers saw the role of communications as communicating results,” said Christiano, “but Nancy really understood at this very deep level that we weren’t going to have any results unless we had communications on the front end.”

Jill Violet was not convinced. When presented with the offer of support for communications she asked to use the funds for programming instead. Barrand and Jane Lowe were adamant about bringing expert communications attention to Playworks.

“There was this need to create a strong brand identity for Playworks” said former RWJF Communications Officer Susan Promislo, MA,<sup>34</sup> “to give them the messaging and the courting of foundations and the communications materials and tools that they would need to start to demonstrate the case for early spread.”

### **Engaging an External Communications Firm**

RWJF contracted with Fenton Communications and Fenton started working with Playworks in 2006 as Playworks began to move into three East Coast cities with funding from the first RWJF grant. Bringing Fenton on “was a fantastic decision,” said

---

<sup>33</sup> Christiano oversaw the communications work with Playworks until she left RWJF in 2010. Currently (September 2017) she is Professor and Frank and Betsy Karel Endowed Chair in Public Interest Communications, University of Florida.

<sup>34</sup> Promislo shared communications responsibilities for Vulnerable Populations with Christiano when RWJF became involved with Playworks in 2005. Subsequently she moved to a different team. She returned to the team to oversee the work with Playworks after Christiano left the Foundation in 2010. Currently (September 2017) she is Director of Communications Strategy, Princeton University.

Christiano, “because they were so invested in the program and they brought in a guy named Eric Antebi, who is a messaging genius.”

Antebi, along with Parker Blackman who led Fenton’s support for Playworks, helped the Playworks/RWJF team recognize that Playworks’ target audience wasn’t parents but school administrators and a message was needed that would resonate with them. He also was a passionate advocate for evaluation that would demonstrate real benefits to teachers and students from “something squishy like play,” said Christiano.

### ***Getting the Message Out***

The communications team had a dual challenge: getting people to take play seriously and understand the need to “fix” recess, and establishing Playworks as a solution.

Many people view play as something that children do naturally and, to them, the concept of structured play seemed meaningless at best, or controlling and detrimental to children’s well-being at worst.

While school principals were well aware of the “recess problem” and looking for solutions, many people did not realize that recess time had been reduced or eliminated at many schools or that it actually created problems at schools where it did exist.

Establishing the credibility of the Playworks model was “an ethical place to start,” said Christiano. “We don’t have any business promoting something so broadly without being pretty sure that it works.”

The communications strategy, therefore, had to make the case that play mattered and to clearly demonstrate the kind of impact that Playworks could have, especially since schools were expected to pay for it. The Fenton team did that by embedding information about Playworks in reports on the broader issue of recess and play.<sup>35</sup> Some examples:

- A cover story placed in *Education Week* about the Open Society Institute evaluation that showed dramatic reductions in suspensions (see description in [Evaluating the Practice of Playworks](#) above).<sup>36</sup>
- The RWJF report, *Recess Rules*, on recess as a major opportunity for physical activity. This report cited Roger King’s 2007 telephone survey of principals and the 2006–2007 Harvard Family Research Project evaluation that showed Playworks

---

<sup>35</sup> This was a formula—easing into a program’s value from the issue rather than starting with the program—that Fenton later repeated with other programs in the Vulnerable Populations portfolio, such as Health Leads.

<sup>36</sup> See “[Baltimore District Tackles High Suspension Rates](#),” *Education Week*, April 24, 2007.

working in a Boston school. This report is also described above in [Evaluating the Practice of Playworks](#).<sup>37</sup>

- A first-of-its-kind Gallup poll of elementary school principals in 2010 in which principals reported that recess has a positive impact on academic achievement and learning. Almost all (96% and 97% respectively) said that recess has a positive impact on social development and on general well-being.<sup>38</sup> The results of this poll were then used in articles, briefings, and so on.

The report of these results published by RWJF, *The State of Play*, also noted that routine surveys of hundreds of teachers at Playworks schools have found that teachers can reclaim up to 18 minutes of learning time each day as a result of fewer playground problems spilling over into the classroom.

Examples of the extensive communications strategy also included:

- Telling the story of “how Playworks had made a transformative difference in schools,” as Christiano described it, through production of a three-minute video that distilled a week’s experience at one Playworks school. That video, said Christiano, “was fundamental to helping Playworks spread into new schools and gain support.”
- Placing key pieces in publications like the *Washington Post* and the *New York Times*.
- Re-vamping the Playworks website.
- Developing a video designed to shore up support among key policymaking audiences: school superintendents and leaders.
- Reaching out to publically visible opponents of Playworks who saw it as an overly-controlling rein on kids’ free-play, and inviting them to see Playworks in action. These efforts led to conversions in their thinking and resulting support for Playworks.

### ***The Intersection of Communications and Evaluation***

As the communications strategy unfolded, the Stanford and Mathematica evaluations were also underway. Much of the communications effort around the evaluations was geared toward getting the findings to the right audiences and ensuring that they understood and appreciated that Playworks was one of very few models evaluated in a randomized, controlled trial, with a strong methodology, “that produced quite stunning results,” said Promislo.

Antebi noted that plenty of programs get sensationalized and garner substantial support, but are not actually effective. “It was fundamental that Playworks worked,” he stressed.

---

<sup>37</sup> See *Recess Rules: Why the Undervalued Playtime May Be America’s Best Investment for Healthy Kids and Healthy Schools*, Robert Wood Johnson Foundation, 2007.

<sup>38</sup> See *The State of Play: Gallup Survey of Principals on School Recess*, Robert Wood Johnson Foundation, 2010.

“It was well-run and didn’t have a crisis every day. Where communications came in was to tell the story of their effectiveness, or to talk about the impact of play with Playworks as an example.” The evaluation was, he said, “a big deal because having these proof points was important to what we were trying to do.”

Tension existed, however, between the different ways in which communications professionals and researchers think and operate.

The researchers had an academic approach that was crucial to credible research but which made them “lousy communicators,” in Antebi’s view. Research writing works for another researcher but a reporter or lay audience may come to a very different conclusion from reading the same material.

Negotiations over the writing of the publically-posted reports were a struggle. The communications team wrote the executive summaries and press releases by working out the language with the researchers, but held its collective breath when a reporter got hold of the full report or talked with a researcher by phone.

In this process the communications team came to realize that if, in addition to reading the research report, a reporter actually saw Playworks in action and talked with a principal, teachers, students, and the Playworks coach it made a “huge difference—they got what was so valuable about this program,” said Antebi.

So the team decided to avoid media coverage, if possible, where a reporter did not visit a school. This focus on in-person experience of Playworks was also helpful in mitigating controversy around the spending of sparse school funds on a recess program.

### ***Name-Changing as Game-Changing***

As Playworks grew it became clear that the name Sports4Kids did not at all describe what the program was about. In 2007 Christiano broached the idea of a name change to Violet, who took a little time to warm to the idea but came to understand the value and then threw herself behind it.

The New York City-based branding agency DeSantis Breindel, led by owner/partner Dru DeSantis, was engaged to handle the re-branding and developed the Playworks name. Playworks had big aspirations to grow and scale, and to do that, said DeSantis, “they needed a new name, a new identity. They needed to look every bit as good as their program was.” Name changes can be very effective in signaling organizational change and growth, she noted.

The firm did a lot of research with Playworks’ constituents: teachers, superintendents, funders, internal staff, etc. The hard work paid off in a name that everyone involved, or who hears of it, considers a winner. “Part of the power of the name change was going



from something that was basically incorrect and uninspiring to a name with potential to feel like a movement and to amplify this notion of passion mixed with rigor,” said DeSantis. ““The play works’—it’s the double-entendre that was effective.”

Once the new name was in place, said Christiano, “we didn’t have to work so hard to explain the program anymore. That was probably one of the most powerful and effective re-namings I’ve ever seen. It was critical to helping the organization grow.”

Getting internal staff to buy in to the new name required dedicated education about why and how it was done and what the expectations were for the new name. The ideal, said Antebi who handled the roll-out, is to organize the name-changing so that, like flipping a switch, one day it is the old name and the next day it is completely different. “Once people make that change they never look back,” said Antebi. “But until then, they’re totally afraid. We learned that lesson at Playworks.”

### ***Working with an External Communications Firm***

As the lead firm working with Playworks Fenton acted as something of a general contractor that did much of the work but also subcontracted with others when a particular expertise was required. “The fact that we could think about communications with that 360-degree point of view allowed us to be strategic and then find a way to get the thing that needed to be done, done,” Antebi said. He credits RWJF with being a funder that was willing to help “when we had the right idea and it required additional resources.”

Antebi also noted that he had attended a strategy session with Roger King that led to Fenton’s use of King’s telephone survey of principals. The value of a communications strategist like Antebi can be multiplied if that individual is party to larger strategy conversations about a program as these conversations keep the communications function in the loop and can spark ideas for communications and marketing that will support the overall program strategy.

### ***Communicating to Policymakers***

Playworks also worked with the communications firm Burness, primarily on communications with policymakers. Through RWJF’s Connect program Burness brought Playworks representatives, including coaches, from 10 sites to Washington to meet with Congressional staff. They also bused Congressional staff to Baltimore to see Playworks in action and hear from teachers, school leaders, and parents.

Burness provided general advice on building relationships with policymakers at the national, state, and local levels. These officials “could be important allies for the work that Playworks was doing,” said Ben Milder, Burness senior vice president and director of its public policy team. They convened a Capitol Hill briefing when the evaluation

findings were released to help policymakers understand the importance of recess and appreciate how Playworks connected with social and emotional development.

### ***Playworks Internal Communications Staff***

When Fenton started working with Playworks, Playworks itself had no internal communications staff and for the first few years Fenton filled that role.

With a large program like Playworks and a goal to spread it across the country, said Promislo, “it was key to have a communications team inside that could work with Fenton and with us to execute everything that needed to be done.”

Playworks hired a communications director in 2008 and began to ramp up its communications and marketing capabilities. The director was considered to be a strong implementer and partner with RWJF and Fenton but not a leader or strategist.

Over time it became clear that a thinly-staffed communications team wasn’t nearly enough. Playworks’ board urged senior leadership to hire a chief marketing officer who brought leadership and strategic capabilities. Now, in addition to the chief marketing officer hired in 2014, a communications manager handles mid-level responsibilities along with a dedicated group of communications and marketing professionals who address social media and other functions.

The rule-of-thumb is that organizations should spend between 3 and 5 percent of their total budget on communications, according to Antebi, who advises organizations planning to scale to use that rule as a good reference point.

### ***Acceptance of Communications by Playworks Leadership***

While Violet’s initial reaction to the concept of communications assistance was skepticism and reluctance, she, Cushing, and the Playworks team soon became convinced of the crucial role it played in “bringing their vision to life,” said Promislo. Violet, in her view, has been “an incredibly effective champion of how funders should be in the game of strategic communications and how impactful it is for grantees. She’s able to influence other donors and other grantees about how much further the ball can be pushed down the road when you do strategic communications the right way.”

Promislo sees something of a change among funders with regard to investing in strategic communications. RWJF was an early and sustained leader in this area, she said, but many others are now getting on board. The level of investment that the Foundation put into communications during the heyday of Vulnerable Populations when it was using it to drive scaling is rare. But “the rest of the field is making strides,” she said.

## ***Limitations of the Communications Work***

At RWJF the connection between Playworks and key Foundation initiatives, particularly Childhood Obesity, was not mined for all of its potential benefits according to Playworks communications consultants, perhaps in part due to perceived barriers at that time between different portfolios at the Foundation.

“It felt like we had our hand tied behind our back and that was only because of the Foundation’s internal structure, the way that they divided their programs. It had nothing to do with any diagnosis of what the world needed or what was good for Playworks,” said one. Said another, “Sometimes breaking down the Foundation’s internal silos was the hardest thing to do.”

In retrospect, Promislo wishes the communications team had done more work in building the case for play among the broader public. Communications were focused on Playworks as a wonderful model with “incredible benefits,” she said. But the program faced continued resistance to the notion of play as “a serious, credible, policy-relevant priority. People saw it as a nice-to-have, but not a must-have.” The focus on the value of Playworks itself “seemed so intuitive to us,” she said, “but I wonder whether we missed the opportunity to help build the case for play that would have helped them in a bigger, broader sense.” In time, she believes, that case was aided by Playworks becoming linked to social and emotional learning, an issue with strong current traction.

## ***The Evolving Role of Communications as an Organization Scales***

As the audience for Playworks grows, and with it the need for further expansion through training programs and the provision of tools to a yet broader audience with varying racial, ethnic, and cultural identities, the need for communications becomes even greater. Different regions focus on different messages—Cushing cited physical activity in Denver, violence prevention in Philadelphia, and school climate in Portland, Ore., as examples. The potential impact of moving Playworks beyond the direct service model increasingly depends upon the ability to communicate with people with whom Playworks staff has less direct and regular face-to-face contact.

The fundraising audience has also shifted somewhat in recent years, with individual donors becoming increasingly important.

Cushing wanted a new way of talking about Playworks that would work for these new donors and others. At the same time, she wanted to create a clear and consistent description of Playworks that everyone at Playworks would use.

After much discussion and internal persuasion the key line, introduced in 2013 and which everyone now uses, is: “At Playworks we believe in the power of play to bring out the best in every kid.” This line has been so effective that Antebi has tried to get other clients

to do something similar. He believes that having a “crystal clear identity” is powerful for an organization and becomes much more important as the organization scales.

Danielle Pifer, Playworks TeamUp site coordinator in Colorado, captures the essence of Playworks’ communications on the ground: “Telling those stories to other people really gets them on board with what Playworks is about. The more we talk about it and show the impact, the more people are going to get on board with the idea in a big way.”

### **Lessons and Insights: Communications**

#### **➤ Lessons for Organizations**

- **Communications is not just publicity.** It is a strategic tool, and if used that way it can help making a lasting difference in a program.
- **The development of an organization’s message can be of great help in getting staff to think through what the organization is about.** Communications is not only valuable in getting the message to the outside world but can engage and energize internal staff as well.
- **A name changing can be game changing.** While staff may be attached to the original name and may also question using resources for name changing rather than programming, investment in an identity change can pay significant dividends.
- **A sense of trust and a willingness to be open with each other on the part of the organization and its external communications partners are critical factors in the successful communication of the organization’s message.** Thus, care must be taken in choosing the right partner for the organization and in nurturing the relationship.
- **Including communications strategists in the organization’s wider strategy conversations will contribute to the creation of communications efforts that will bolster program strategy.**
- **The best champions for an organization are the people on the ground.** For Playworks this would be the coaches, junior coaches, students, principals, etc. The coaches in particular—earnest, dedicated, enthusiastic, and inspiring young people who really understand what Playworks is about—can help others see Playworks through their eyes and their experiences.
- **Making sure reporters, film-makers, and other media see the program in action, rather than only reading reports and press releases, contributes to their full understanding of and connection to the program.** The most effective communications results will come from combining evaluation findings with actual in-person experience of the program.
- **Communicating evaluation results requires sensitivity to the communications capabilities of the messenger.** In particular, academic researchers, experienced in writing and speaking to academic audiences, may not have the relevant skills to

effectively engage with mainstream media and the general public. Their academically-focused language and approach may result in misinterpretation by non-academics, leading to surprising, and possibly problematic, misunderstandings that are distinctly off-message.

- **As an organization scales, messaging may have to change to connect with changing audiences.** But it is imperative that the organization's identity remain crystal clear.
- **The bigger an organization gets the more communications challenges will arise.** Knowing the weak spots and having a plan to deal with them early on are essential to sustaining the communications strategy. It is critical to be vigilant about this especially as the organization grows, new people are hired, and training may be inconsistent.
- **An organization, especially one looking to scale, must be prepared to spend a substantial amount on communications—3 to 5 percent of the total organizational budget is the rule of thumb.**

#### ➤ Lessons for Funders

- **Funders and organization leaders should assess the degree to which an organization is ready for communications assistance.** Communications should be used when the program has a track record of achievements to promote and is prepared to make good use of communications resources. It is appropriate for funders to evaluate that readiness and try increasing levels of support as communications efforts are successful.
- **Providing substantive communications support to grantees will return value to a funder by helping to ensure the success and sustainability of their grantees, and thereby, their investments.**
- **Offering fundraising consulting support to grantees is another sustainability measure for funders to consider.**

## 6. Fortifying Organizational Infrastructure and Governance

*“If you have the right people, anything is possible.”*

*—Jill Violet, Playworks Founder and CEO*

An organization needs not only strong leaders, it needs a solid infrastructure, with staff members who apply their individual skills and experience to jobs that play to their strengths and provide the functional expertise the organization requires. Organizational mission, objectives, and policies must be clear and people should understand and be committed to these and recognize the roles they play in daily operations.

Back when there was just a part-time Playworks program in two schools in Berkeley the Playworks organization consisted of Violet and her basketball buddy Andrea. Twenty years later (September 2017) the total staff stands at 661 (87 national, 330 regional, and 244 AmeriCorps members) and a 13-member board of directors provides oversight. Getting from there to here took some doing and a lot of learning by Playworks leaders about the need for functional expertise and experienced professionals to be added to the roster.

### ***Building an Organization for Growth and Scaling***

Creating an organizational infrastructure to support growth and scaling, and then putting that infrastructure to work over the long term, is fraught with challenges. Violet acknowledges her early reluctance to hire the requisite level of expertise. When she tried to push through with the people she had on staff when the organization was young and small, it didn't always work. It was a difficult time. Violet didn't understand that "some people are going to have to move on and you're going to have to hire people with functional expertise. You had to live through that to know it."

The process has been a continuous learning experience for Violet, then Cushing, and the whole Playworks organization. In retrospect, Violet said, she would have invested in internal communications earlier and in much more sophisticated financial leadership. But these are part of the learning curve for a brand-new organization. The Playworks experience in this regard is not so different from many others. Said Jennifer Hoos-Rothberg from Einhorn Family Charitable Trust, "There was this push on programs, communications, branding, and a couple of places in capacity building and organizational health were underinvested."

A strong and comprehensive structure is now in place that supports Playworks' future plans—a result of much effort and attention by Violet, Cushing, and others. But the challenges are ongoing.

### ***Managing Change***

Cushing cited "managing our employees' feelings about change" as one of the hardest parts of growing and scaling. She noted the anxiety that comes with each leap and each launch of something new. Learning to manage change, she said, is what her job is about. "That's been really challenging, enabling people to feel ownership and inclusion in that change. There were seven or eight key people who rode the roller-coaster of change in 2005 and 2006 when we first started expanding nationally. They were critical to building an organization that could successfully continue a rapid pace of growth for more than a decade after that."



## Aligning Action with Strategy

Dealing with the alignment of action with strategy is another challenge. While everyone is clear on the Playworks mission, day-to-day decisions about whether something is aligned with the strategy often bring disagreement, and handling that tension is challenging. Kim Tanner from Jenesis Group noted the importance of framing the conversation “so they understand how it aligns with why they show up for work every day—which is because they care about the role that Playworks plays in kids’ lives.”

## Recruiting for Operational Excellence

Recruiting real talent to a nonprofit is tough, in Cushing’s experience. Money is not always the biggest barrier—it can be hard to persuade people with substantive experience and ability to take a chance on a nonprofit.

Playworks Board Chair Joy Weiss believes that moving an organization from “homegrown management to recruiting for operational excellence” is a big challenge as it can be difficult to get operational excellence internally. But she feels that challenge is being met at Playworks. In the last few years they have been “able to build a strong executive team with enough legs on the stool so that it is stable and has enough competence in the functional areas to drive that kind of growth,” she said.

## Nurturing Organizational Culture

Culture has always been very important at Playworks. “We knew that we wanted to maintain, protect, and feed our culture as it grew out into these other regions,” said Cushing. Involving experienced coaches in the roll-out to new cities encouraged some to move to those cities and be part of the new region.

The culture, of course, revolves around play and the underlying values of the program itself permeate the workplace. “All these things that I know to be true about kids, around how it matters, how it feels, are absolutely in evidence in trying to build a workplace and an organization that’s scaling effectively,” Violet stressed.

“The major strength of Playworks,” said TeamUp Site Coordinator Pifer, “is community and support. I feel supported and strive to want to work hard because of the community I’m in. I see all the great work that everyone’s producing and how much they care about Playworks and its mission and how much everyone embodies the core values. That is such a big strength of Playworks that it makes me never want to leave!”

## Meeting Evolving Organizational Needs Associated with Scaling

The need for organizational infrastructure will only continue to expand and evolve as Playworks actively begins to scale. “Playworks [as a discrete program is still] absolutely necessary for the momentum of the idea,” said Cushing.

Building a movement, she said, “is about unleashing others”—spreading the Playworks model and the case for play through connections with many other organizations. This unleashing is another cultural change within Playworks, said Cushing, “requiring a lot of change management and functional expertise we don’t completely have in place.”

### ***The Need to Readjust/Realign as an Organization Grows and Scales***

Playworks’ ability to try new things, see how they work, learn from that experience, adjust as necessary, and move forward has been a key characteristic of its operation.

Board Chair Joy Weiss sees “the capability to test and correct quickly as one of the key things that Playworks has brought to the table. That is one of the reasons that we’re in the position now to grow the way we are growing and to have the financial commitment necessary to affect that growth,” she said. “They have measured results where possible in order to reach decisions that are more data-driven than purely observational or qualitative,” in Weiss’s view. As Playworks continues to grow and scale, Weiss stressed that it will be important not to lose that discipline.

Not everything has worked. But when something didn’t work Playworks leaders and staff were committed to figuring why and how to not do it that way again. Einhorn’s Hoos-Rothberg credits Playworks leadership with handling significant roadblocks well and being “able to achieve greater impact” as a result.

The “bold goal” for the future—where Playworks wants to get to—is clear and took a lot of thought. Action plans are important for the journey but plans will no doubt be adjusted and revised as it becomes evident, through data-informed and measured experience, how relevant and successful they are.

### ***Developing a Board for Guidance and Oversight***

Branding agency owner/partner Dru DeSantis joined the Playworks board in 2007 right after the re-branding work she spearheaded and at a time when the board was in flux. A number of members had served since Playworks was a very small organization and they were ready to move off. DeSantis described the board at the time she joined as more of an advisory board, with members contributing their individual knowledge and expertise. As the organization grew, the board evolved into more of a fundraising and governing board.

While there is only one national governing board with fiduciary responsibility, there are 22 regional advisory boards that are charged with fundraising for their region. Recruiting members for those many regional boards has been a challenge, as is establishing appropriate and balanced relationships between the national board and the regional boards, especially with regard to fundraising.

Entrepreneur Joy Weiss<sup>39</sup> is the current (June 2017) board chair. She joined as a member in May 2012, having been a donor for many years, and became chair in July 2014. Weiss comes from the for-profit world and this is her first nonprofit board experience. She was surprised to find that while “there is a mission-driven playful spirit at Playworks, they are very disciplined in their approach to how they get things done. I would put the Playworks’ organization up against many of the startup companies that I have been affiliated with in terms of quality of management and quality of process.”

When Weiss joined the board was losing some members due to term limits, and it lacked the racial, economic, and geographic diversity that characterized the Playworks community. When she took over as chair Weiss worked to add both diversity and numbers to the board as well as philanthropic sense. The board seemed overly dependent on the agenda of Playworks management and lacked its own agenda to execute.

The board engaged in active recruiting of new members and now stands at 13, including Violet who Weiss thought important to have on the board. Weiss would like to have at least 15 or 16 members in order to get broader diversity and to adequately staff the four board committees. A Playworks executive also sits on each committee and attends part of each board meeting before board-only discussions. Weiss believes it is important for the board to understand who is on the executive team and how they work together.

As Playworks takes off on its scaling plans the board is developing a parallel plan for itself. It is considering what the board needs to look like and what needs to change “for the board of 2020 to match the Playworks of 2020,” Weiss said

### **Lessons and Insights: Organizational Infrastructure and Governance**

#### **➤ Lessons for the Organization**

- **Investing in experienced and knowledgeable staff is critical for organizational success.** This involves recruiting for operational excellence and building a strong executive team able to develop and execute plans for growth and scaling. The executive team should be complemented by capable line staff members who understand how their jobs support the mission, receive sufficient training and professional development, and are able to make necessary decisions.
- **Internal data monitoring systems must be top notch, clearly understood, and rigorously and routinely used.**
- **An organization, through its leaders and managers, must be able to take stock quickly when faced by a roadblock and readjust to move forward productively.** It must have the ability to test and correct quickly.

---

<sup>39</sup> Weiss has been CEO of several startup companies. Currently (September 2017) she is President and CEO, Dust Networks Product Group at Linear Technology in Hayward, Calif.

### ➤ Lessons for the Board

- **As an organization evolves the board must transition from a group of “friends of the founder” to one that has the independence to provide objective and thoughtful oversight and serious fiduciary responsibility.**
- **Boards must be of a size appropriate to reasoned and timely decision making.** Members should include a diversity of individuals who bring a range of experiences, knowledge, perspectives, and connections to the community the organization serves.
- **The board must be attentive to the financial health of the organization in concert with its program and strategy.**
- **The board must have a plan for itself that matches the future plans for the organization.**
- **The right balance between the roles and responsibilities of the national board and the local/regional boards must be found.** This will maximize the contribution of each while making the best use of everyone’s time, talent, and energy.

### ➤ A Lesson for Funders

- **A funder’s willingness and ability to assess the organizational strength of a grantee is a great advantage both to the funder and to the grantee.** This includes evaluating whether a grantee organization has the self-awareness to learn, adopt what works, and throw out what doesn’t. The funder will then be best-positioned to assist the organization in its development and growth.

## 7. Cultivating Relationships

*“The relationship with Playworks was particularly warm and honest and candid. It didn’t feel like a funder-grantee relationship. It very much felt like an ‘everybody-has-a-job-to-do’ relationship.”*

*—Ann Christiano, Former RWJF Communications Officer*

**If people hadn’t behaved like they did, it wouldn’t have worked.** This is the overall message about the many relationships woven throughout the Playworks experience. The importance of these relationships is mentioned again and again by those involved, both in characterizing their own connections with others as well as their observations about the ongoing interactions of others.

These relationships may be special to Playworks, and it is, of course, both impractical and mostly impossible to require people to relate to each other in particular ways. But several themes emerged as key to these successful (and “super fun” one person called them) relationships—themes that characterized the relationships that developed and

endured and were so integral to the Playworks experience. These are themes that also have relevance for other organizations and funders engaged in long-term, complex relationships geared to achieving ambitious goals.

### ***A Prevailing Sense of Partnership between Grantor and Grantee***

The relationship between Playworks and RWJF is routinely described as a “partnership,” a partnership rooted in trust on all sides. “Nancy [Barrand] and Jane [Lowe] weren’t just our funders,” stressed Violet. “They were active, sleeves-rolled-up partners in this process. There was nothing we couldn’t tell them, no fears or concerns, or worries that we couldn’t share. And it made all the difference in the world.”

This sense of partnership extended also to Playworks’ relationships with other key funders and was noted by them as being a hallmark of their experience with Playworks.

### ***A Willingness to Be Open, Forthcoming, Calm, and Practical***

Practicality, realism, and patience prevailed among all parties involved and allowed for the free flow of information that resulted in timely and productive meeting of a range of big and small challenges.

Being open with its funders was critical to the trusting and productive relationships that developed between Playworks and those investing in it. A similarly candid relationship existed between Playworks and its external communications consultants, which enabled the consultants to do their best work in advising and supporting Playworks’ communications needs.

Playworks Board Chair Joy Weiss used the word “humility” to characterize the underpinning of these relationships—being able and willing, when you want the right thing to happen but don’t know what to do, to tell someone who may have an answer.

In a larger sense, the relationships were respectful of each other’s knowledge, experience, and commitment to Playworks’ success.

### ***Forging Strong Working Relationships inside RWJF***

RWJF staff from different departments had critical roles in the growth and scaling of Playworks. They all (program, finance, legal, and communications) note the close, positive team spirit that developed and that became essential to the forward movement of Playworks over a decade of intense effort.

The attention to Playworks at RWJF was not seen as a zero-sum game. Resources were directed as needed and not taken from another area.

## *Developing Strong Relationships with Other Funders*

While RWJF's presence is seen to have discouraged some funders, RWJF enabled other key funders to make the investments that they did. The Foundation's commitment gave great credibility to Playworks, and the various types of assistance RWJF provided allowed other funders to feel comfortable making the level of investments they did.

RWJF and other major funders developed close working relationships in the service of Playworks, relationships that endure even as RWJF is no longer a funder itself. Now those funders have taken on important roles in Playworks' planning for the future.

## *The Benefits of Continuing the Playworks-RWJF Relationship*

The strong and deep relationship between RWJF and Playworks can continue to provide rich benefits to both, and maintaining a connection—which does not need to be financial—should be encouraged and fostered. “Doing that in a way that shines more light on them,” said former RWJF President and CEO Risa Lavizzo-Mourey, MD, MBA, “and gives them opportunities for visibility that they might not have, or gets them visibility when they need it most—those are the ways in which our communications and our bully pulpit can continue to help, even if we're not providing major funding.”

For RWJF an ongoing connection provides the opportunity to continue to tell the Playworks story in relation to the Foundation's larger objectives.

## **TOP TAKEAWAYS**

The Playworks experience offers many lessons, as described in this report, for growing a small local organization into a national presence and for scaling a novel idea into a national movement. These lessons have clearly been important to Playworks and RWJF, yet they are likely also to be important to other organizations looking to scale other ideas and to other funders considering whether and how to invest in a program or intervention. “This is about Playworks,” said RWJF's James Marks, “but it's also about the meta issue of what do you have to go through, what does it take, what are the kinds of skills, and what do you look for in one that has a chance to be a winner.”

While experiences will vary by setting, the key thematic takeaways that have emerged from these lessons can be expected to have relevance across many settings.

## **The Scalable Idea is Square One**

- **It begins with a scalable idea.** Playworks is a simple idea, one that solves a real life problem existing in communities throughout the country that people want solved, with a business model that generates earned revenue. Without these characteristics scaling would not be worth considering.



- **A commitment to a “crystal clear” identity must be balanced with a willingness to consider new ways of honoring that commitment that allow the organization to adapt to growth, to new audiences, and to the demands of movement building.**

### **Human Qualities are Paramount**

- **The actual people involved will determine the success or failure of the scaling effort.** The drive, intelligence, openness, and commitment to quality of all of the players in the scaling of Playworks (Playworks, RWJF, outside consultants, and other funders) were, and continue to be, critical factors in getting Playworks to where it is today and preparing it for its bright future. The individual and collective impact of all of these special individuals cannot be overstated. Perhaps they are unique to Playworks, but there are other organizations that also have special people with the ability to push for the future. These are the organizations with the potential to scale.
- **Strong leadership and top notch management capability are essential.** It cannot be done without those. It is important that leaders have a strong and positive sense of self—understanding what they are good at and what they are not good at, and able to consider the views of others. A strong ego and great passion—tempered by humility—are needed to get through the scaling adventure.
- **Relationships among key players that are characterized by honesty, openness, practicality, realism, and patience will offer a scaffold of support able to weather most storms and lead to well-thought-out plans and good solutions in tricky circumstances.**

### **Expertise is Indispensable**

- **While Playworks is a simple idea, it takes a complex process to grow an organization and, ultimately, scale an idea.**
- **A program may much more benefit from the infusion of the right expertise at the right time, than from an infusion of cash that the organization is unprepared for.** Money is not the whole answer, not by a long shot.
- **Expertise is needed both internally and externally.** An organizational infrastructure commensurate with the organization’s present and future goals that includes individuals with requisite knowledge and experience in finance, program development/implementation/management, marketing, human resources, and other areas will help ensure that those goals are met. Expertise from external consultants—evaluators, communications professionals, financial advisers, etc.—can bring vital resources to bear as needed for continued progress.

## Some Things are Especially Important before Starting to Scale

- **An organization thinking about scaling, or a funder considering an investment to help scale an organization, would do well to consider the following questions before getting too far along:**
  - Is this a scalable idea? Is there an audience/market?
  - What evidence is there that the program works?
  - Is there strong leadership?
  - Does the organizational infrastructure have the people, policies, and procedures, needed for the demands of growth and scaling?
  - How stable is the financial situation? How strong is the financial management?
  - And specifically for a funder: How prepared is the organization to make best use of your investment, whether that investment be money and/or expertise?
- **Remember: scaling is a marathon not a sprint.** High energy is nice to have. Stamina is essential.

## PLAYWORKS INTO THE FUTURE

*“I really feel like we’re just now scaling.  
We’ve grown really big, but the proof of scaling  
is that the idea has momentum of its own.”*

*—Elizabeth Cushing, Playworks President and COO*

Playworks is at an exciting point in its trajectory since its first days in two schools in Berkeley. It is financially stable and has a strong infrastructure of experienced and knowledgeable professionals in the national office and at the regional level. It has a strong and engaged board. It is supported by systems, policies, and procedures designed to ensure its smooth operation today and to enable it to meet its goals for the future. It has many funding partners and continues to gain national attention. The scaling of Playworks and the vision of every kid in America getting to play every day is well on its way.

At the national level, a new \$30 million growth capital campaign includes, among other components, staff raises, 401K plans, and investing in human resources capacity at the organizational level, as well as building a digital platform and additional supports for schools. Said Violet, “We’ve got this big audacious aim of 3.5 million kids, in 7,000 schools having safe daily play” by December 2020. That’s about 10 percent of public elementary schools in the United States.

To do this, Playworks is ramping up its TeamUp approach that focuses on training school personnel to handle recess, with oversight by a Playworks site coordinator who works as a consultant to four schools, spending a week a month with each. This enables Playworks to reach exponentially more schools and more actively engages school staff. The approach is being well-received by both Playworks staff and by the schools they serve.

“The TeamUp approach seemed to better fit the needs of our school,” said Heather Woodward, principal of Kenton Elementary School in Aurora, Colo. “A big piece of what we’re trying to do is develop the capacity of others to be able to lead and learn. A full-time coach doesn’t develop the capacity of our staff to be able to participate more fully in the experience of Playworks. For our school TeamUp is a better fit.”

For the future Playworks will focus more on school districts, rather than individual schools. “The tipping point is at the district level,” said Cushing. “We’ve seen signs that when districts choose Playworks and co-create a safe and healthy play strategy, that achieves more lasting change,” Violet noted.

At the same time, Playworks staff acknowledges that, even with new approaches, doing it all through Playworks will be too slow. Given the size of the country and the fractured nature of the educational system, said Cushing, “If we don’t leverage the ability to make safe and healthy play happen through others, we’re not going to get there.”

“The most amazing thing that Playworks has done in this recent shift—but it’s going to require a shift in every facet of the organization—is that they’ve really changed their endgame,” said Einhorn’s Hoos-Rothberg. “It’s no longer about Playworks in every school, it’s about safe and healthy play in every school.”

So Playworks is forming partnerships with other organizations that have large networks connected to schools in order to distribute Playworks’ innovation and know-how more broadly. These include partnerships with Boys and Girls Clubs of America and Let’s Move Active Schools, training City Year to use Playworks’ model in its programs, and giving Playworks’ tools for free to schools implementing the RULER program developed by the Yale Center for Emotional Intelligence. “All of which will increase safe and healthy play,” said Cushing, “but won’t add Playworks schools to our roster.”

Setting its sights even higher, Playworks applied for the 100&Change competition<sup>40</sup> offered by the MacArthur Foundation that will award a grant of \$100 million to make significant progress in solving a critical societal problem. The Playworks thesis is that the “the basic skills of cooperation, empathy, and listening are not robust enough in our citizenry to respond” to the extreme polarization found in our country at this time and that Playworks, is a “straightforward and cost effective solution” to this serious problem.

---

<sup>40</sup> See [information](#) about Playworks’ application and recognition on the Playworks website.

The application proposed a plan—for 20 million students in 40,000 schools by December 2022—to use play to build the necessary social and emotional skills for children to become thoughtful leaders and effective citizens.

Playworks’ proposal was selected as one of the top ten educational submissions out of more than 1,900 total applicants. One judge noted that “I found the proposal bold in its simplicity and yet could have lasting far reaching impact to the benefit of the broad public good.”

## CONNECTING PLAYWORKS TO A CULTURE OF HEALTH

*“People ask us what we mean by Culture of Health. The best answer I could give is to just take them to any Playworks school in the country. Every time one kid gives another kid a high five, every time a 5th-grader teaches a new game to a 1st-grader, and every time two kids resolve a disagreement with Rock Paper Scissors they are building a Culture of Health—not just for themselves, but for every child that will follow in their footsteps.”*

*—James S. Marks, RWJF Executive Vice President*

With its emphasis on the development of key social and emotional skills, contribution to physical activity, and positive effects on readiness to learn and school climate, Playworks is something of a poster child for the building of a Culture of Health. In fact, it was the impetus for the inclusion of “play” in the Foundation’s description of health as starting “where we live, learn, work, and play.”

Playworks offers a compelling story of a contributor to a Culture of Health, especially with its focus on elementary school children. As Playworks continues to emphasize and promote its value as a venue for social and emotional learning and for the development of engaged citizens for the future that story becomes even more persuasive.

Former RWJF President and CEO Lavizzo-Mourey described Playworks’ role as “a bridge for us between Healthy Weight and the way we’re focusing on the whole child now. That was a very important overarching lesson that we learned.” Lavizzo-Mourey also noted Playworks’ value as a connection to related organizations such as KaBOOM and the President’s Council for Fitness, Sports and Nutrition. “Because it is an idea that’s so accessible to people once they hear it, it could become something of the leading edge for a lot of other work and I think that made them good partners,” she said.

RWJF's Tracy Costigan noted that Playworks is now making the case both for its success in adding physical activity to kids' lives and also for its achievements in teaching social and emotional skills. "That's very aligned with where we're going with our Healthy Children, Healthy Weight thematic area, where we're thinking about the whole child and physical, social, and emotional health and development," she said. She sees future opportunities for tying the Playworks story to RWJF's interest in child and youth development.

On the cusp of an exciting new era, Playworks offers an ongoing opportunity for RWJF. In the view of one long-time communications consultant: "There's no reason that the Foundation shouldn't be using Playworks as an example of a Culture of Health."

## CONCLUSION

The Playworks journey has been long and complicated and Playworks and RWJF were true partners in this endeavor. Playworks brought the vision, passion, talent, and flexibility of leaders Jill VIAlet and Elizabeth Cushing and the energy, enthusiasm, and commitment of its many national and regional staff. Under the thoughtful and accessible leadership of Nancy Barrand and Jane Lowe RWJF contributed direct funding, financial and technical advice, and skilled consultants. All have been essential to Playworks' arrival in 2017 ready to capitalize on the "long, hard slog" of growth and scaling, as VIAlet described it. The lessons from its journey are many, for RWJF and for others.

Playworks' future is bright—and so is its role in leading the widespread recognition of play as critical to children's physical, social, and emotional development and to the potential for improved civic engagement in the future. And, of course, for letting kids have some fun as they play every day.

*"I do believe in my lifetime there will be safe and healthy play in every elementary school across the country and that Playworks will have been the catalyst for that."*

*—Jennifer Hoos-Rothberg, Einhorn Family Charitable Trust*

# Appendix

## A - PLAYWORKS TIMELINE

### 1995

- Elementary school principal expresses exasperation with recess to Jill VIALET.

### 1996

- VIALET founds Playworks and opens in two schools in Berkeley, Calif.

### 2003

- Playworks expands to San Francisco.
- Jill VIALET contacts consultant Roger King for help thinking about how to scale up.

### 2004

- Jill VIALET named Ashoka Fellow.
- Playworks receives first AmeriCorps contract to use AmeriCorps volunteers as coaches in elementary schools.
- Elizabeth Cushing hired as director of evaluation.
- RWJF's Nancy Barrand contacts Jill VIALET.

### 2005

- RWJF awards grant to Playworks of \$4.4 million for Phase 1 (to Baltimore, Boston, and Washington) of its national expansion.
- Playworks expands to Baltimore.

### 2006

- Roger King begins working with Playworks on strategy for growth and scaling.
- Fenton Communications begins working with Playworks.
- Playworks expands to Boston and Washington.
- Playworks expands into Silicon Valley, Calif.

### 2007

- A study funded by the Open Society Institute in Baltimore finds Playworks to be effective in reducing suspension rates in local schools.



- A study by the Harvard Family Research Project finds improved student classroom behavior and cooperation and less carryover of playground conflicts to the classroom.
- Roger King continues working with Playworks, identifying what they have learned and where they want to go and developing a strategy to do that.
- Playworks begins to feel the financial stresses of growth. While the number of school contracts expands, Playworks begins to face significant cash flow challenges due to the timing of cash receipts. An organization-wide focus on collections averts a crisis of not meeting payroll.
- Review of Playworks' growth strategy held at RWJF in November. Nancy Barrand and Jane Lowe decide to take forward a grant request for a second, much larger and more ambitious grant. They also request approval for a line of credit to bridge Playworks' working capital needs.

## 2008

- Playworks expands to St. Louis and New Orleans.
- RWJF awards grant to Playworks of \$18.7 million for Phase 2 (growing to 27 cities and 650 schools) of its national expansion.
- RWJF provides Playworks a \$750,000 term loan to bridge the timing issues associated with school contracts. Meanwhile, RWJF begins work on a larger credit facility to support the scaling plan.
- Playworks hires an internal communications professional.
- Playworks serves 105 schools and 40,000 students in eight cities.

## 2009

- Playworks expands to Los Angeles; Newark, N.J.; and Portland, Ore.
- Formerly called Sports4Kid, Playworks announces its new name.
- Instead of making a direct loan to Playworks, RWJF structures a \$3.5 million credit facility from OnePacific Coast Bank that is backed by a \$3.5 million deposit with the bank. The OnePacific Coast Bank loan closes on August 20, 2009.
- RWJF awards grant to Stanford University to evaluate implementation of Playworks in eight San Francisco and Silicon Valley schools.
- Playworks serves 170 schools and 70,000 students in 10 cities.

## 2010

- Playworks expands to Denver, Detroit, Houston, Minneapolis/St. Paul, and Philadelphia.

- RWJF awards two grants to Mathematica Policy Research for a randomized controlled evaluation of Playworks.
- On August 20, 2010, OnePacific Coast Bank extends the \$3.5 million line of credit, secured by a RWJF deposit, for an additional year. Maturity date is August 19, 2011.
- In October, RWJF financial/legal team realizes that the line of credit is serving a purpose not originally intended. In addition to bridging working capital needs related to school and government contracts, it is also being used to cover potential, but not yet secured, fundraising. RWJF discusses the risk this poses with Playworks as it continues to scale.
- Playworks serves 248 schools and 105,000 students in 15 cities.

## 2011

- Jill Violet named chief executive officer.
- Elizabeth Cushing named president and chief operating officer.
- RWJF awards grant to Mathematica Policy Research to evaluate physical activity in Playworks.
- On August 19, 2011, OnePacific Coast Bank extends the \$3.5 million line of credit, secured by the RWJF deposit, for an additional year. Because discussions are underway on a new structure, maturity date is initially set at December 19, 2011 and then extended through February 29, 2012.
- Playworks expands to Albuquerque, N.M.; Chicago; Durham, N.C.; Jackson, Miss.; Phoenix; and Salt Lake City.
- Playworks serves 130,000 students in 21 cities.

## 2012

- Study by Mathematica Policy Research and Stanford University finds that Playworks reduces bullying and decreases transition time from recess to learning.
- Growth Capital Campaign launches with a goal of \$26.4 million.
- RWJF awards grant to Playworks of \$8.5 million for Phase 3 of its national expansion (continuing the scaling of the program to 27 cities and 700 schools, training school personnel in 1,000 schools).
- On March 1, 2012, OnePacific Coast Bank renews the line of credit for \$2.5 million, secured by a lower \$2.5 million deposit from RWJF. OnePacific Coast Bank also provides a \$1 million credit facility secured by Playworks' accounts receivable. RWJF is pleased initially that Playworks can obtain \$1 million without the Foundation's deposit as security.

- Financial pressures increase as fundraising expectations fall short and do not keep pace with expense growth. Cash flow issues are satisfied by drawing down lines of credit and accelerating grant payments on multi-year grants. By September 2012, Playworks asks RWJF to restore its deposit with OnePacific Coast Bank to \$3.5 million allowing the bank to increase back the line of credit to the original level. The maturity date is October 31, 2013.
- Playworks expands to Milwaukee, New York City, and Newark.
- Playworks serves more than 170,000 students in 22 cities, with another 100,000 in over 400 organization served by Playworks training.

## 2013

- Study by Mathematica Policy Research and Stanford University finds that Playworks increases vigorous physical activity and students' feelings of safety when compared to control schools.
- New CFO, David Carroll, joins Playworks in August and develops contingency plan tied to financial milestones. Playworks' board approves the plan.
- On October 22, 2013, OnePacific Coast Bank extends the line of credit, secured by a \$3.5 million RWJF deposit, for an additional year. In addition, OnePacific Coast Bank and RSF Social Finance agree to provide a \$3 million credit facility (equal exposure to each bank) backed by Playworks' accounts receivable. Maturity date on the facilities is October 21, 2014.
- Playworks expands to Indianapolis.
- Playworks serves more than 430,000 students.

## 2014

- Playworks pilots TeamUp, its new model connecting site coordinators with several schools.
- Playworks now has capable financial staff and a financially savvy board chair. Financial position is no longer in a critical state.
- RWJF converts the \$3.5 million OnePacific Coast Bank deposit into a \$3.5 million grant to Playworks. The grant is to be used as a board-designated sustainability fund thus replacing the need for the \$3.5 million OnePacific Coast Bank line of credit.
- RWJF awards concluding grant to Playworks of \$1.5 million.
- RWJF awards grant to Stanford University to investigate whether Playworks reduces student absenteeism.
- Playworks expands to Atlanta.

- Playworks serves more than 850 schools and more than 500,000 students.

## **2015**

- Playworks TeamUp expands to a majority of Playworks regions.
- RWJF awards grant to University of Santa Cruz to assess the experience of TeamUp.
- Playworks serves more than 1,000 schools and more than 500,000 students.

## **2016**

- Playworks is 20 years old.
- The fiscal 2016 audit shows Playworks to be in a solid financial position, with \$5 million in credit availability and no outstanding debt.
- Playworks submits application for MacArthur Foundation's 100&Change competition.

## **2017**

- Playworks selected as one of the top ten educational submissions out of more than 1,900 total applicants in MacArthur Foundation's 100&Change competition.
- Playworks serves over 1,300 schools in 23 communities, reaching more than 700,000 students directly and through training services.

## B - PLAYWORKS' REVENUE HISTORY: FY 2007 THROUGH FY 2016

Earned Revenue	FY07	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16
Coach/TeamUp Fees	2,562,239	3,073,716	3,610,882	4,386,029	6,048,147	7,327,261	8,978,905	10,066,943	12,069,818	13,222,086
Pro Fees		51,773	98,761	88,438	294,955	693,805	911,626	1,347,677	1,894,605	1,980,808
Government	928,848	1,626,751	2,236,996	1,940,515	2,032,224	2,122,643	2,215,740	1,481,196	3,474,453	3,627,356
<b>Subtotal Earned Income</b>	<b>3,491,087</b>	<b>4,752,240</b>	<b>5,946,639</b>	<b>6,414,982</b>	<b>8,375,326</b>	<b>10,143,709</b>	<b>12,106,271</b>	<b>12,895,815</b>	<b>17,438,875</b>	<b>18,830,250</b>
Fundraising	FY07	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15	FY16
Regional	1,111,556	1,282,580	1,186,851	1,169,402	2,431,846	3,992,798	5,743,814	7,133,124	9,853,054	10,111,804
National	102,750	983,024	130,837	357,986	547,707	1,993,595	6,470,390	6,943,453	2,658,774	5,338,028
National RWJF specific	1,821,986	2,003,207	3,956,056	4,767,138	6,701,803	4,809,348	4,748,523	2,239,723	1,550,000	0
<b>Subtotal Fundraising</b>	<b>3,036,292</b>	<b>4,268,811</b>	<b>5,273,744</b>	<b>6,294,526</b>	<b>9,681,356</b>	<b>10,795,741</b>	<b>16,962,727</b>	<b>16,316,300</b>	<b>14,061,828</b>	<b>15,449,832</b>
<b>RWJF % of Fundraising</b>	<b>60%</b>	<b>47%</b>	<b>75%</b>	<b>76%</b>	<b>69%</b>	<b>45%</b>	<b>28%</b>	<b>14%</b>	<b>11%</b>	<b>0%</b>
<b>TOTAL REVENUE</b>	<b>6,527,379</b>	<b>9,021,051</b>	<b>11,220,383</b>	<b>12,709,508</b>	<b>18,056,682</b>	<b>20,939,450</b>	<b>29,068,998</b>	<b>29,212,115</b>	<b>31,500,703</b>	<b>34,280,082</b>
Earned Revenue % of Total	53%	53%	53%	50%	46%	48%	42%	44%	55%	55%
Fundraising % of Total	47%	47%	47%	50%	54%	52%	58%	56%	45%	45%
<b>RWJF % of Total Revenue</b>	<b>28%</b>	<b>22%</b>	<b>35%</b>	<b>38%</b>	<b>37%</b>	<b>23%</b>	<b>16%</b>	<b>8%</b>	<b>5%</b>	<b>0%</b>
<b>RWJF Working Capital Contribution</b>								3,500,000		

## C - GRANTS FROM RWJF

### Main Expansion Grants

- National Expansion of Playworks: A Program that Promotes Physical Activity and Play at Schools (Phase 1)
  - \$4,421,874
  - 11/1/2005 – 6/30/2008
  - ID 53552
- National Expansion of Playworks: A Program that Promotes Physical Activity and Play at Schools (Phase 2)
  - \$18,734,344
  - 7/1/2008 – 5/14/2012
  - ID 63981
- Supporting Playworks in expanding operations to every major metropolitan area in the United States (Phase 3)
  - \$8,488,328
  - 5/15/2012 - 6/30/2014
  - ID 69844
- Supporting development of new strategies to increase Playworks' programmatic and financial sustainability (Concluding grant)
  - \$1,500,000
  - 8/15/2014 - 8/14/2015
  - ID 71960

### Program-Related Investments

- Term loan
  - \$750,000
  - 12/10/08 – 9/30/09
  - ID 65655
- \$3.5 million Certificate of Deposit (drawn down from 2008 authorization) at One PacificCoast Bank to secure the bank's line of credit to Playworks



## Financial Grant

- Establishing an internal Playworks' fund to meet ongoing cash-flow needs and reduce external borrowing
  - \$3,502,878
  - 6/23/2014 - 6/22/2015
  - ID 72000

## Evaluation Grants

- Evaluating the implementation of Playworks in eight San Francisco and Silicon Valley schools
  - Stanford University – Rebecca London
  - \$260,000
  - 8/15/2009 - 2/14/2014
  - ID 66189
- Evaluating Playworks' model that uses exercise and play to maximize students' physical, social and academic skills
  - Mathematica Policy Research – Susanne N. James-Burdumy
  - \$1,765,656
  - 4/1/2010 - 12/31/2014
  - ID 67445
- Expanding the randomized experiment of Playworks [Expanding from 20 to 32 schools]
  - Mathematica Policy Research – Susanne N. James-Burdumy
  - \$1,256,384
  - 8/15/2010 - 12/31/2014
  - ID 67807
- Evaluating physical activity in the randomized experiment of Playworks
  - Mathematica Policy Research – Susanne N. James-Burdumy
  - \$552,859
  - 1/15/2011 - 6/30/2013

- ID 67877
- Investigating whether Playworks reduces student absenteeism
  - Stanford University – Prudence L. Carter and Jacob Leos-Urbel
  - \$60,000
  - 1/1/2014 - 2/28/2015
  - ID 71491
- Assessing Playworks' new TeamUp model in promoting high-quality recess in elementary schools and enhancing a Culture of Health
  - University of California, Santa Cruz – Rebecca London
  - \$151,500
  - 7/1/2015 - 12/31/2016
  - ID 72828

## Other Grants

- Supporting the Playworks 2015 Get in the Game annual event
  - \$50,000
  - 3/15/2015 - 7/14/2015
  - ID 72627
- Funding a children's educational television 'MOOPS & SASSY' episode that will promote the mission of Playworks
  - Mack and Moxy, LLC – Heidi Glauser and Brahm Wenger
  - \$80,000
  - 5/15/2015 - 5/14/2016
  - ID 72524
- Scaling up Playworks with an emphasis on providing opportunities for children to practice citizenship in positive and safe environments
  - \$1,000,000
  - 7/1/17 – 12/31/19
  - ID 74582

## **D - SELECTED PLAYWORKS REPORTS**

### **Evaluation Reports and Briefs**

- Playworks Implementation in Eight Bay Area Elementary Schools: Final Report, December 14, 2010
- Playworks Implementation in 17 Schools from 6 U.S. Cities, May 2013
- Impact and Implementation Findings from an Experimental Evaluation of Playworks: Effects on School Climate, Academic Learning, Student Social Skills and Behavior, May 2013
- Impact and Implementation Findings from an Experimental Evaluation of Playworks: Effects on Play, Physical Activity and Recess, May 2013
- Building a Culture of Health Through Safe and Healthy Elementary School Recess, February 2017.

### **Progress Report**

- National Expansion of Playworks: A Program That Promotes Play at Schools, May 15, 2014

### **RWJF Anthology: To Improve Health and Health Care, Volume XIV**

- Chapter Three: Playworks/Sports4Kids, 2010

## E - LIST OF PEOPLE INTERVIEWED

- **Eric Antebi**, former Senior Vice President at Fenton Communications, currently Independent Senior Communications Strategist
- **Nancy Barrand, MPA**, RWJF Senior Adviser for Program Development
- **David Carroll, MPP**, former Playworks CFO, currently Senior Vice President, Finance and Administration/CFO, Jewish Community Foundation of Los Angeles
- **Ann Christiano, MPAP**, former RWJF Senior Communications Officer, currently Professor and Frank Karel Chair in Public Interest Communications, University of Florida
- **Tracy Costigan, PhD**, RWJF Senior Learning Officer
- **Elizabeth Cushing**, Playworks President and Chief Operating Officer
- **Dru DeSantis**, Owner/Partner, DeSantis Breindel, former Playworks board member
- **Peggi Einhorn, MBA**, RWJF Chief Financial Officer and Treasurer
- **Ed Ghisu, JD**, RWJF Associate General Counsel and Chief Investment Counsel
- **Jennifer Hoos Rothberg, MRP**, Executive Director, Einhorn Family Charitable Trust
- **Roger King, MBA**, former Independent Consultant, currently President and CEO, Center for the Collaborative Classroom, former Playworks board member
- **Risa Lavizzo-Mourey, MD, MBA**, former RWJF President and CEO
- **Laura C. Leviton, PhD**, RWJF Senior Adviser for Evaluation
- **Jane Isaacs Lowe, PhD, MSW**, Consultant RWJF, former RWJF Senior Adviser for Program Development
- **James S. Marks, MD, MPH**, RWJF Executive Vice President
- **Ben Milder**, Senior Vice President and Director, Public Policy Team, Burness
- **Janice Opalski, MBA**, RWJF Director, Program Financial Services
- **Danielle Pifer**, Playworks Colorado Site Coordinator
- **Susan Promislo, MA**, former RWJF Senior Communications Officer, currently Director of Communications Strategy, Princeton University
- **Kim Tanner**, Executive Director, Jenesis Group, former Playworks board member
- **Jill Vialet**, Playworks CEO and Co-Founder

- **Joy Weiss**, Chair, Playworks Board of Directors, and President, Dust Networks product group at Linear Technology
- **Heather Woodward**, Principal, Kenton Elementary School, Aurora, Colorado